

BEST PRACTICES PLAYBOOK

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BEST PRACTICES IN NOMINATION & ELECTION PROCESSES

Checklist of Recommendations

1. Follow the timeline for the election process.
2. Section Chair must appoint a nominating committee by January 15th.
3. CBA will send call for applications to the Section membership by February 15th.
4. Follow nominating criteria when choosing applicants.
5. Section must report final election results to Section Liaison by May 31st.

Best Practices

The following procedures are designed to help each CBA Section accomplish three principal goals: increase diversity on Section Councils; increase membership participation and engagement by providing a path to leadership; and streamline the process to free up CBA staff time.

Nominating Committee

The Section Chair shall appoint a Nominating Committee consisting of at least three members of the Section. These should include the Chair, Vice Chair or Past Chair, a young lawyer (age 37 or less, or less than 5 years in practice), if possible, and at least one person from outside the metro area, if possible. The committee shall be appointed by January 15th. The Section Liaison shall work with the Nominating Committee and the Section Chair to complete the election process.

Criteria for Council Nominees

When considering the composition of Section leadership, the Nominating Committee shall consider recognized diversity criteria, including ethnicity, age, gender, sexual orientation, area of practice, firm size, years in practice, and geographic location. The Nominating Committee should strive for a Council that is diverse in as many of these areas as possible, consistent with the size of the Council and its substantive objectives. Other factors to consider may include: the number of terms an individual may serve in order to open up positions on the Council, staggered terms to preserve institutional knowledge (see Best Practices on Council Composition), number of persons per law firm, and prior Section involvement.

We understand that requesting and collecting information from candidates regarding the diversity criteria outlined above can be sensitive and personal. Resources are available through your Section Liaison regarding how to educate your Section Council, including the Nominating Committee, on approaching the topic of diversity with sensitivity.

Please review the Best Practices chapter on Policies and Procedures for further guidance in this area.

Procedure for Nominations

We have discovered that by making a call for “nominations”, we confuse people into thinking they must be nominated by someone. This confusion can lead to sections missing out on some great talent. To remedy this, we have created an application to be filled out by all prospective council members in order to streamline the process across all sections, make it more clear that folks can put themselves up for any position they are interested in and help gather information for a leadership pipeline. This application can be found in the appendices. Your liaison will be sure that this application is included in all section elections going forward.

A call for applications shall be sent to all Section members by Feb. 15th. The CBA will run a full-page ad in Colorado Lawyer February issue calling for applications for ALL Sections. This call shall also be sent to all diversity and specialty bars to encourage participation in the application process. A separate call for applications to the Section Membership should describe the criteria for applicants for the open positions and should be administered through the Section communications such as the Section newsletter, Community, and email.

Any applications received shall be provided to the Section Nominating Committee no later than March 15th.

Elections

The Nominating Committee will select one applicant for each open position on the Council and each open office in the Section. Depending on the bylaws of the Section, the Nominating Committee’s selections may be presumptively final, subject to approval or rejection by the members of the Section; may be subject to final approval by the Council of the Section; or may be subject to approval or rejection by the members of the Section. Once the selection is made, the applicants are to be voted on by the Section by either slate or ballot method. A slate form (described below) is preferred, but not mandatory, in order to minimize staff time devoted to elections. The slate must be emailed to the Section members no later than April 1st.

Explanation of Slate Method

The slate method requires that the Nominating Committee present a full list of the incoming officers and Council members to the Section for approval, with or without prior approval by the Council. The slate is deemed approved unless the Section Chair receives an alternate slate following the criteria below.

If the Section adopts the slate method of election, the Nominating Committee will send its proposed slate to the Section membership. Section members will then have until the April Section Council meeting or April 15th, whichever is sooner to propose an alternate slate signed by at least the number of members specified in the Section's bylaws [which shall be not less than 10 members or more than 3% of the number of Section members as of the beginning of the current calendar year]. If a valid, alternative slate is received by that deadline, the slates shall be voted on by the Section membership. The Section members shall have until May 10th or the May meeting to vote on the slates, and the results will be announced by the Section Chair no later than May 31st.

Explanation of Ballot Method

If the Section follows the ballot method of election, ballots shall be sent to the membership at large by April 15th. Section members shall have until May 10 or the May Council Meeting to complete and return their ballots, and the results will be announced by the Section Chair no later than May 31st. The ballot method requires all chosen nominees to be put on the ballot, emailed to the Section membership, and voted on by any Section members who choose to participate.

Bylaws

Each Section must ensure that its bylaws are up-to-date and are consistent with the actual Section practices, as modified to comply with the mandatory Best Practices. If they are not consistent and compliant, the bylaws should be updated, approved by the Section Council, and submitted to the CBA Council for final approval. The Section Liaison can help navigate this process.

BEST PRACTICES FOR COUNCIL COMPOSITION

Checklist of Recommendations

1. Each Section shall have a Chair, Secretary, Treasurer and Past Chair. Each Section must have a Board of Governors Representative. Each Section may have a Vice-Chair.
2. Each Section shall have a Communications Representative.
3. Any two offices may be held by the same individual.
4. Term limits are required and shall be established so as not to allow any one person to retain any one position indefinitely.
5. Stagger terms to retain institutional knowledge.
6. Make officers aware of their respective position duties.
7. Involve the Past Chair(s) to retain Section institutional knowledge.
8. Attempt to ensure that at least one Council member is from outside the metro area.
9. Attempt to ensure that at least one young lawyer (37 years of age or younger, or less than 5 years in practice) is on Council.
10. Diversity criteria (see Criteria for Council Applicants and Equity, Diversity, and Inclusivity) shall be considered in selection of officers including the Board the of Governor's Representative.

Best Practices

The Best Practices for Section Council composition are designed to increase diversity on Section Councils and increase membership participation and engagement by providing a path to leadership. The following are recommended positions which must be filled; however, it is within the discretion of the Council pursuant to the Section bylaws as to whether these are Council voting positions.

Officers

The Best Practice is for officer positions in each section to include:

- Chair

- Vice-Chair (optional)
- Secretary
- Treasurer
- Past Chair

Additionally, each Section must have a Board of Governors Representative.

It is recommended that each Section Council have a Communications Representative

Any two offices may be held by the same individual. The bylaws will dictate which of the above position will be officer and/or Council voting positions.

Council Terms

Officer positions shall be limited to one-year [or two-year] terms and be successive (the officers move up the chain of command until they are Chair). Other Council positions shall have term limits in order to ensure a rotation of Section membership participation on the Council. The recommended Best Practice is that the Sections stagger at-large Council terms in order to keep some institutional knowledge at all times. In smaller Sections, or when, despite best efforts to expand or improve upon participation are not successful, the Section Liaison will assist the Section to incorporate maximum compliance with the Best Practices, under the circumstances.

Positions and Duties

Below are descriptions of officer duties which are encouraged to be followed and may be incorporated into Section bylaws provisions on officer roles and responsibilities.

Chair

The Chair is responsible for the overall governing of the Section and directing the Council as needed. The Chair sets the agenda, runs Council meetings, and appoints committees and subcommittees as needed. The Chair is also responsible for making sure that parliamentary rules are followed when voting, including electronic voting, on issues.

The Chair should make efforts to keep members who are attending by phone or video engaged in the meeting. The Chair is responsible for making sure that the nominating and election process is followed and completed within the timeframe allotted. If the Section does not have a Vice-Chair, then the Chair is responsible for planning any retreats or symposiums that fall during their term.

The Chair must stay current on all legislation affecting the Section and ensure that the Section's position is timely communicated to the CBA Legislative Director. In smaller Sections, the Chair is also responsible for planning any CLE programs or

events for the Section members with the help of the Council and the Section Liaison. The Chair is responsible for creating meeting agendas and making sure that all of the necessary meeting materials have been gathered. In some Sections, the Chair may appoint the Secretary to be responsible for gathering materials.

The Chair is expected to delegate responsibilities to standing or ad hoc committees, task forces, ad hoc positions, or the Section Liaison to the extent contemplated or permitted by the Section's bylaws, and subject to the Chair's ongoing oversight and supervision.

Vice-Chair

Not all Sections have a Vice-Chair. For those that do, the Vice-Chair is responsible for covering for the Chair when the Chair is unavailable. The Vice-Chair can be responsible for planning the speakers and topics for any retreats or symposiums during their term. The Vice-Chair should also be current on all legislation affecting the Section. In some Sections, the Vice-Chair may be responsible for the planning of CLE programs and events for the Section membership with the help of the Section Liaison. Be sure to check your section bylaws for any specific Vice-Chair duties.

Secretary

The Secretary is responsible for taking, and keeping, minutes (See Best Practices regarding minutes in the Meeting Protocol chapter) at all meetings. Secretaries may be appointed by the Chair to gather materials for the Council meetings. If there is no Vice-Chair, the Secretary is responsible for planning any retreats, symposiums, and other Section events.

Treasurer

This is a REQUIRED Best Practice position for all Sections. This position may be combined with the Chair, Vice Chair or Secretary position if a Section's bylaws so provide. This position is responsible for creating an annual budget, ensuring the Section operates within its budget, and tracking how the Section spends its money on a monthly and annual basis. Please see the FIDUCIARY DUTIES Section for further details regarding budgeting and the CBA accounting process. There is a sample budget in the Appendices of this Playbook.

Board of Governor's Representative

The Board of Governors reached an overwhelming consensus at its October 2016 meeting to clarify the role of the Board of Governors. Based on that consensus, the primary role of the governors is to serve as an ambassador and conduit of communications for the Colorado Bar Association while retaining a governance role.

Below is the description of the Board of Governors position which was approved at the May 2017 meeting of the CBA Board of Governors.

As a Governor serving on the Colorado Bar Association Board of Governors, you are:

- An AMBASSADOR who creates awareness about the Colorado Bar Association within the legal community and beyond;
- An accountable LEADER who represents the Colorado Bar Association as well as local constituents;
- A BRIDGE-BUILDER between the Colorado Bar Association and local constituents that promotes relationships and productive communication;
- An INNOVATOR who offers new insights or institutional knowledge for ongoing organizational development and decision-making.

(Expectations) of Governors:

- Attend all Board of Governors meetings;
- Prepare for all Board of Governors meetings;
- Actively participate in all Board of Governors meetings;
- Accept committee or project assignments;
- Stay informed;
- Evaluate individual and collective performance;
- Act in accordance with Fiduciary Duties (Care, Loyalty, Obedience);
- Review Council minutes;
- Be in touch with Vice President/ Council liaison;
- Regularly interact with constituents about Colorado Bar Association and Board of Governors matters and solicit feedback.

(Expectations) of Colorado Bar Association

- Provide orientation on Colorado Bar Association and Governor role
- Inform governors of substantial CBA business and actions of the Executive Council
- Notify Governors of the meetings well in advance
- Solicit input for agendas
- Send Meeting materials in advance
- Provide a point of contact and/or liaison
- Provide leadership training and tools
- Provide opportunity to listen to governors at meeting and in advance
- Maintain Board of Governor portal with necessary information

Past Chair Involvement and/or Communications Representative

The recommended Best Practice is that the Section have at least one Past Chair as a voting or non-voting member of the Section Council in order to maintain institutional knowledge while permitting new member participation at the officer level.

The recommended Best Practice is that the immediate past Chair becomes the Communications Representative. The duties of the Communications Representative include helping onboard new Section members. The Section Liaison shall coordinate with this person in order to provide the tools needed to accomplish the Communications Representative duties.

Sections are encouraged to develop the role of the Communications Representative and incorporate it based upon these Best Practices.

Responsibilities for the Communications Representative may include maintaining Section welcome letter templates, overseeing implementation of practices to identify new members at Section events, facilitating ambassador assignments, identifying new lawyer and law student members eager to engage with the Section, collecting information and suggestions for engaging with new and young lawyer members, and thanking new members on behalf of the Section Council for engaging in Section activities.

At-Large Members

In addition to the officer positions, each Section shall have at least four at-large Council members, including, if possible, at least one young lawyer and at least one member from outside of the Denver metro area.

Young Lawyer Liaison

If the Section does not have a specific position for a young lawyer on its Council, the Section shall have a liaison position for a young lawyer, which could be a non-voting position. This young lawyer position shall have a one-year term and be limited to that one term in order to open this position to new lawyers. Once the young lawyer's term is up, that person should be considered by the Nominating Committee for an at-large voting position.

Other Considerations

Sections should avoid having more than one person per law firm on a Section Council at one time, including at-large members, though lateral moves sometimes make this impossible to avoid.

Council Member Duties

Below is a Best Practices list of the recommended responsibilities of Council members:

- Policy formation
- Budget oversight
- Committee and Subsection formation and leadership

- Proposed legislation
- Onboarding and engaging new Section members
- Legislative review and approval
- CLE and event planning
- Newsletters
- Minutes
- Short-term and long-range planning
- Community Engagement

Subcommittee Oversight

It is the responsibility of the Section Council to oversee committees, subsections, and working groups of the Section (the “subcommittees”). The officers of the Section shall review each Section Subcommittee annually to determine whether the subcommittee chairs and/or co-chairs are following procedure and continuing to create/maximize Section benefits for their members. The Section Council should expect that the subcommittees will implement and follow the Best Practices on Nominations and Election, Onboarding New Members, and Engaging with Members to the fullest extent possible. It is the duty of the Section Chair to replace any subcommittee chair who is not performing to the standards of the Section.

The subcommittee chairs should be expected to provide a report at each Council meeting. Routine reports may be submitted via email and distributed with the meeting agenda. Section Chairs should consider replacing subcommittee leaders who fail to report at two or more consecutive meetings without valid reasons.

BEST PRACTICES FOR ON-BOARDING NEW MEMBERS

Checklist of Recommendations

1. Send a welcome letter to all new Section members.
2. Appoint ambassadors to help new members navigate the Section.
3. Keep a list of other Section Chairs available and maintain contact as needed.
4. Appoint a Communications Representative to help maintain a dialogue with the Section members.
5. Facilitate a path to leadership for those interested.
6. Create a recognizable way to identify new attendees at meetings or events.
7. Make an effort to engage new members and new attendees.
8. Attend at least one Young Lawyer and one Law School event each year.
9. Create smaller ways for members to be involved in the work of the Section.

Best Practices

These Best Practices are designed to grow Section Membership by engaging and retaining current members and attracting new members.

Ambassadors

Sections should develop the role of ambassador to guide new members through their Section, its benefits, potential leadership opportunities, and other avenues for engagement with the Section.

Welcome Letter

The Section shall develop a welcome letter to send to new Section members introducing the Section, its leaders, and offering assistance for the first few months to introduce new Section members to other Section members and guide them through the processes and procedures of the Section. This process is now automated through Thrive. A sample welcome letter is provided in the Appendices to this Best Practices Playbook.

It is the responsibility of the Section Chair to ensure that every new member of the Section is (1) contacted, (2) offered the opportunity to have an ambassador at Section events, and (3) invited to subscribe to Section communications including newsletters and Thrive. Whether they do this themselves or delegate the responsibility to the Communications Representative, is up to the Chair.

Talking Points Checklist

The Section shall develop a checklist of talking points for ambassadors to cover with new members. It is the responsibility of the Communications Representative to coordinate distribution of the talking points to ambassadors and facilitate their use in advance of Section events.

Ambassador Events

It is a best practice for the Section Council to arrange events at Section retreats and symposia for new members to meet their ambassadors and the Section's leadership. These events may include a welcome reception for ambassadors and new members.

Past Chair Involvement in Recruiting and Retaining New Members

The recommended Best Practice is that the immediate Past Chair shall become the Communications Representative. The duties of the Communications Representative would be to help onboard new Section members, including recruiting and retaining new and young members. The Section and Section Liaison shall provide the Communications Representative with the tools necessary to accomplish on-boarding of new Section members.

Leadership Development

The Best Practice of the Section shall be to identify members who become involved in the Section and facilitate their path to leadership within the Section. Paths to leadership shall be transparent and clearly communicated to members. It shall be the responsibility of the Section Council to ensure that leadership positions are open to all members, including diverse members.

By way of example, but not as a requirement, a clear path to leadership may include a young lawyer seat on the Council which may then progress to the officer track of Treasurer, Secretary, etc., or this person could also become Communications Representative to the new members to help involve other young lawyers in the Section.

Identifying First-Time Attendees at Section Events

Sections shall institute a process for identifying first-time attendees at events, continuing legal education (CLE) seminars, symposia, and retreats. The Best Practices Committee recommends the use of name tags and an identifying feature on the name tag such as a sticker, colored dot, or other recognizable mark to identify first-time attendees. It is the responsibility of the Section officers to communicate to the membership the mechanism for identifying first-time attendees and encourage existing members to welcome these new members to Section activities. The Section Liaison and Communications Representative or other Chair appointee shall be responsible for ensuring that the identification process is carried out at all Section programs. Another option is to create a mentor type program where members that are well versed in attending section events make plans to attend an event with a new member in order to introduce them around and show them the ropes.

Tools for Improving Young Lawyer Engagement

In order to get young lawyers interested—we need to engage them at the law school level. The CBA offers free student memberships, and a free year of full membership plus two (2) free sections to those who have just passed the bar exam. The problem has been keeping them engaged once they must pay dues on their own. As fewer firms are paying their associates dues, it is becoming harder to keep younger attorneys as members. Below are suggestions and recommendations from the Best Practices Committee for involving young lawyers in the Section.

Fast Track to Leadership: Law Student Liaisons

A Section may fast track a young lawyer's path to leadership by getting them involved at the Council or other Section committee level early in their careers. For example, the Young Lawyers Division includes voting Council member seats for four law school student members: two from each local law school. These people are tasked with running events and reaching out to students about various YLD events that would be of interest to law students. Section Council members should also make a point of attending at least one law school event and one YLD event each year.

Sections may consider law student liaisons in order to facilitate outreach to up and coming lawyers. The Young Lawyers Division and their law student liaisons may be resources for Sections to identify law students interested in engaging with Sections to a higher degree, including as law student liaisons to the Section. Law student liaisons may also be a resource for connecting a Section with the law school's student group most closely aligned with the Section's purpose (e.g., Student Business Law Society, Animal Law Group, Natural Resources Student Group, etc.) to facilitate identifying future Section members and creating opportunities to host events with the law schools.

New Lawyer Authorship

A Section may involve new lawyers in writing articles for newsletters, Colorado Lawyer, or The Docket. The opportunity provides a way for the new lawyer or law student to get involved and get that person's name and work product in front of the people who may impact the new lawyer or student's career. Sections are encouraged to provide authorship opportunities that are shorter in length for law students and new lawyers to assist in accommodating other constraints on their time. Additionally, Sections may facilitate co-authorship between Section members, including between members and law students.

Other opportunities for authorship may include assisting with Section communications, website, and social media. Or helping to create engagement on Community through relevant posts.

Ambassadors: Assistance Navigating Networking Events

Section events can be intimidating to a law student or brand-new lawyer. If a new member is paired with an experienced Section member, that person can provide introductions and help navigate the event. Sections are encouraged to personalize invitations to events by connecting new attendees with Section ambassadors in advance of the event: if someone is expecting the new member to attend, that new member may be more likely to attend and meaningfully engage with Section members.

Sections are encouraged to research their potential members in order to better plan ways to increase their participation in networking. The Young Lawyers Division and law student liaisons may be resources for obtaining information and ideas related to potential Section members. It is the CBA's experience that networking at bars and restaurants central to the law school campuses and offering food and drink tickets result in better attendance by law students.

Focusing on Current Events & Issues

The CBA has seen an increased interest from law students and new lawyers in current legislation impacting their fields of interest so that they can be knowledgeable and have something to discuss with more experienced lawyers. Section ambassadors are encouraged to emphasize the availability of Bill Track 50 as another way to attract and keep young lawyer and law student interest and engagement in Sections, and to use current events, legislation, and hot topic issues to develop events for attracting new and young members.

BEST PRACTICES IN ON-GOING ENGAGEMENT & COMMUNICATIONS

Checklist of Recommendations

1. Use the CBA Community & Social Media feeds to promote Section events.
2. The Section must promote and encourage involvement outside the metro area.
3. Create a robust virtual and hybrid process to ensure those calling into a meeting can fully participate.
4. Create and distribute a brief monthly or quarterly newsletter.
5. Use the Section's CBA Thrive Community to promote events and make it a landing place for members.
6. Communicate regularly with the entire Section membership.

Best Practices

These Best Practices are designed to ensure that all Section members are informed about Section activities, programs, events, and engagement opportunities.

Social Media, CBA Thrive, and *The Loop*

Social media is a challenge for all Sections. Having 30 different accounts for each social media platform isn't sustainable. The policy is to use the main CBA social media account (LinkedIn) to promote Section events. The Open Forum on CBA Thrive is a good place to reach members across the Bar Association. Post events in the Section Community and the Open Forum Community. This gives each Section event a wider audience than just Section followers. If the Section Council has a Communications Representative, this would fall under that individual's responsibility. It may also be delegated to an officer to oversee.

The CBA will do its best to make this as easy as possible. Forms to guide posting something on social media or in *The Loop* are available in the Appendices. The form should be filled out for each posting, Section event, or article to make the posting process seamless. These forms include important deadlines.

Use of Section-specific or individual officers' social media accounts for Section-related business is prohibited. These accounts are challenging to maintain as officers come and go from the Section Council. In addition, if they are not properly moderated, or if access is not restricted correctly to Section members, such accounts can create a risk that statements made in public may be misunderstood as

offering legal advice to the general public or may otherwise subject the Section and the CBA to potential liability.

Involvement Outside of Denver Metro

To attain our goal of reaching members across Colorado, the CBA asks that each Section annually sponsor at least one out-of-metro area program to include its non-metro area members. Events outside the metro area can be more expensive and time-consuming than traditional metro area programs. Use out-of-metro members to help plan and run these events to defer costs and provide a boots-on-the-ground approach to event planning. They know the location and the market better than anyone, so use that knowledge.

CBA Master Event Calendar

Through the local bar associations, there may also be an opportunity to join an existing event in the local judicial districts. Dates and locations of CBA events should be posted to the Open Forum and Section Communities. The CBA also keeps a master event calendar to avoid double-booking dates.

Section Council members are responsible for determining which other Section events may be of interest to their members and helping promote and publicize those events through Section communications, and the Section Community.

The Section Communications Representative is responsible for ensuring that event details are provided for posting on the master event calendar. If the Section is interested in attending, planning or having a table at an event, please let the Section Liaison know, and the Liaison will handle all the details.

Communication Opportunities

Newsletters

One of the best ways to get new members involved on a micro-volunteer basis is by writing articles for the Section newsletter. These are shorter articles than Colorado Lawyers, but they still get the author's name out to those in their field. Usually, when a Section announcement is made that newsletter content is needed, it does not proceed beyond the Section's Council. Utilize CBA social media, sub-committees, email, etc., to ask for an article on a specific topic and give a word limit. Identifying current hot topics or topics of interest in the request for authors and articles may help identify members willing to write for the newsletter.

To help with content and to keep from overwhelming members—keep newsletter articles to one page and include a synopsis of the last meeting, next meeting time

and date, one content article, announcements and events, and a message from the Section Chair.

It is a Section Best Practice requirement that if a Section does not currently have a newsletter, it must have some form of communication with the entire Section membership, which communicates upcoming events and substantive information of interest to members (e.g., articles) on at least a quarterly basis.

Section Community on CBA Thrive

The Best Practice for each Section is to use its Community as a bulletin board. When a member logs into the Section Community, it will show any articles, events, discussion topics, etc., relating to that Section. This should be delegated to the communications representative for oversight.

BEST PRACTICES IN GUIDING THE LEGISLATIVE PROCESS

Checklist of Recommendations

1. Appoint a legislative point person/representative.
2. The legislative point person must attend the CBA's mandatory legislative training.
3. The legislative point person assigns bills as needed to Section Council members/committees to follow and updates the Section Council on bill progress.
3. Respond to every bill sent to your Section.
5. Follow timelines and deadlines for any bill of interest.

Best Practices

CBA Section membership input into the legislative process is critical for our state, both for the practice of law as well as for Colorado's citizens, government, and businesses.

The Process

The legislative process is fast-paced and changes by the minute. This process requires extreme attention to detail and adherence to strict deadlines. Timely communication of a Section's position on a bill is a figurative matter of life and death for the bill's potential to become law. Once a bill is passed or killed, there is no going back. These decisions must be made early, quickly, and be routed correctly.

There is typically a 24 to 48-hour turnaround time in reacting to something at the State Capitol. Sections take different approaches to the legislative process based on how important legislation is to their area of law and the size of the Section. Early in the life of a bill—the process runs smoothly with the legislation following the chain of command and decisions being made at meetings or by email. As the legislative session progresses, however, the process becomes too fast-paced to make meetings or emails a reasonable response to any and all legislation coming through the Section.

Point Person

The Best Practice requirement is that the Section Council appoints a legislative point person. The CBA's Director of Legislative Relations will route pending bills to the point person. The point person shall assign bills to the Council/Section members based on their areas of expertise. The point person should use a tracking system, either the CBA's bill tracking program or a simple Excel spreadsheet. This creates accountability for the Council members who have been assigned a bill. The Chair acts as a back-up to the point person to ensure nothing falls through the cracks. If the Section is large enough and involved in enough legislation, it should have a committee chaired by the point person. If the Section is extremely involved in legislation, the committee may want to have a weekly conference call to be sure all deadlines are met and the correct information is getting back to the CBA lobbyist and the CBA Legislative Policy Committee.

Appointing a point person gives the Section Council the ability to make better decisions much more quickly. The Section Council must create an action plan for when decisions are needed immediately. The Section Council must determine whether the point person has the discretion to act on behalf of the Section, or whether an email vote is required. If an email vote is required, the Section Council must determine what constitutes a quorum and how many votes are needed to take action. The Section Council should also ensure that the process the Section Council follows is the same process outlined in the Section bylaws. If the processes differ, the Section Council may need to update the Section bylaws.

Testifying

It is the responsibility of the point person or other members of the Section Council to testify at the Capitol or assist in identifying members willing and able to testify, if needed. The CBA Legislative Director has a list of members who have regularly testified; however, on occasion, they may need someone with specific expertise.

Important note: No one can testify or lobby a bill on behalf of the CBA without the knowledge and approval of the Section Council and the CBA Legislative Director. As noted below, this also requires approval of the CBA Legislative Policy Committee or its executive leadership. If you are testifying on a bill as a general citizen, or on behalf of a client, you may not use the CBA or Section name at any time.

Information needed by the CBA Legislative Director

On any particular bill, the Section Council must determine how to proceed. When a Section has an interest in a bill, the CBA's Legislative Director needs to know the Section's position. Below are the recommended Best Practices options for the Section's position on a bill:

- Watch
- Amend
- Support
- Oppose
- No Position (this is when a Section does not take a supporting or opposing position)

The Section must provide an answer to the Legislative Director by the deadline given for every bill forwarded to it, even if the response is “no position”.

The CBA Legislative Director needs to know the Section’s position on every bill. NOT ANSWERING IS NOT A RESPONSE AND IS NOT AN OPTION.

Bill Tracking

The CBA uses Bill Track 50 to follow legislation electronically. This allows for easy dissemination to the Section Council and Section as a whole through the Section webpage. There will be 2 trainings on the legislative process as well as how to best utilize this software in September and October of each year. Additional training can be scheduled as necessary throughout the year. Every Section’s point person is required to attend the training on legislative process annually or schedule additional training with the Section liaison or CBA Legislative Director.

Legislative Policy Committee

The LPC is the governing body that determines the position that the CBA as an organization will take a position on a particular bill and, if so, what the position of the CBA will be. All legislatively related items MUST go through this committee before being taken to the Capitol. This is an appointed committee and if the Section has a matter that comes before the LPC, the Section leaders will be invited to participate. Any CBA member can receive emails from the LPC as a way to remain in the loop even if the member is not an LPC representative.

The Legislative Policy Committee (LPC) and the CBA Legislative Director meet at the CBA offices every week during the legislative session.

BEST PRACTICES FOR FIDUCIARY OBLIGATIONS & FINANCES

Checklist of Recommendations

1. Each Section must have a Treasurer.
2. Each Section must have a written budget.
3. Each Section must have a process for approving budgetary requests.
4. Each Section must be transparent with its financials.
5. Each Section must consider setting a reserve within its budget.

Best Practices

These Best Practices are designed to ensure that Sections are tracking their use of member funds responsibly and are accountable to their members and the CBA for use of those funds.

Financial Guidelines

Although Sections have their own funds from their Section dues, Sections are not separate entities from the CBA. Each Section is part of the CBA and must follow certain guidelines when it comes to how Section funds are spent. The CBA gives the Sections as much autonomy as possible but has overall fiscal authority and may intervene in an extreme situation.

The Section should spend its funds on programming, events and other items of interest which provide a benefit to its members. This should be a transparent process. The financial records of each Section are available to any member who may wish to see them. Be sure that, as a leader of the Section, you are comfortable with your members seeing how their money is spent.

1. Make section money work for your section and its members. Get more bang for your buck by making sure that any money given links directly back to the section mission or the population it serves.
2. The CBA does not operate on a use it or lose it budgeting process. Spend wisely to move the groups mission forward. There is no punishment for saving money.
3. That said, do not hoard funds either. There are many worthwhile programs that can use extra funding if a section has built up a large surplus.

- [COBALT—Colorado Bar Association Leadership Training Program](#)
- [Colorado High School Mock Trial](#)
- [Colorado Bar Foundation](#)
- [Our Courts](#)
- [Metro Volunteer Lawyers](#)
- [CBA-CLE Programs](#)
- [Legal Aid Foundation](#)
- [Specialty and Diversity Bars](#)
- [Local Bar Association programs](#)
- [Diversity on the Bench Coalition](#)
- [Colorado Diverse Attorney Community Circle](#)

Reach out to you section liaison for further information on any of these programs.

Treasurer

Each Section Council must have a Treasurer. The Treasurer is responsible for creating a budget (this could be done by a committee chaired by the Treasurer) and making sure that the Section finances remain within that budget. Sections may choose to combine the Treasurer position with another officer position on the Section Council.

The CBA will provide Treasurer training at the start of each fiscal year regarding general guidelines as well as the abilities and limitations of the CBA accounting system software. The Treasurer of each Section is required to attend the treasurer training or arrange additional training with the Section Liaison.

Sections should develop a process for submitting receipts to both the Treasurer and the Section Liaison. Request for funds shall be submitted to the Treasurer prior to the Section Council meeting. This way, the Treasurer can be prepared to make an educated decision and/or recommendation to the Section Council.

Any committees or subsections of the Section Council should present their budgetary needs to the Treasurer before the annual budget is finalized. Once the budget is approved, funds may be moved into that subsection general ledger account and can be spent without further Section Council approval.

Budget Creation

To create a budget, the Section Council should start by considering revenue and expenses of prior years. Section budgets will vary based on Section dues and the size of the Section membership. Issues with respect to the budget should be brought to the Section Council's attention by the Treasurer.

The CBA accounting reports are set up around General Ledger (GL) accounts which may be further divided among Section committees, subcommittees or projects and events.

The CBA does not use accrual-based accounting. Income and expenses are credited and debited on a cash basis when they are received or paid. If a Section pays for a CLE program a month before it happens, that payment shows up in the current month's report rather than the month that the program takes place.

When it comes to registrations for events, the income hits the section account when the registration comes in, not when the payment is received. Therefore, if there are unpaid invoices at the end of the year, there may be an income adjustment in the section financials.

Dues

If a Section Council finds that it is spending all of its Section's money each year on member benefits, it may be time to consider raising the Section dues. Each year in March, the CBA sends a list of all Section dues to Section leadership with a letter asking if a Section would like to change its dues. It is the responsibility of the Section Council to periodically consider the amount of its dues and whether a dues increase is warranted. Typically, dues are raised in \$5 increments. A Section should be mindful about how often it raises its dues in order to minimize the impact an increase in dues may have on membership.

Administrative Fee

The CBA charges an administration fee for each member, each year which is calculated by taking the number of members in the Section on July 1 and multiplying it by an amount determined by the CBA Executive Council. The total administrative fee for the Section is taken out of the Section account on a monthly basis. That fee is \$10 per member and will increase \$.25 a year every year after the 2019-2020 fiscal year to account for inflation.

The Administrative Fee covers overhead, Section Liaison time, as well as incidentals like copies and other meeting needs. This amount is set by a CBA Executive Council and may occasionally be raised to help cover some of the costs associated with running the Sections. Notice and explanation of changes in administrative fees will be provided to the Sections far enough in advance to allow for dues adjustments if necessary.

Reserves

A Section is not required to keep a reserve of funds in its account. Many Sections choose to set a reserve amount. The reserve amount is Section-specific and depends

on the size of the Section and the Section's budget. If the Section does decide to keep a reserve, 25-30% of the Section's annual budget is sufficient. Sections do not typically see a large fluctuation in membership from year to year which may generally give cause for having a large reserve amount, but the Sections may choose to keep reserve amounts in order to assist in periodic efforts by the CBA to fight legislation or help other legal service organizations in times of need.

Overall, maintaining large reserves is not helpful to the Section membership and Section Councils should be mindful to weigh the costs and benefits to its membership of having or not having a reserve fund before setting the reserve amount.

BEST PRACTICES IN MICRO VOLUNTEERING

Checklist of Recommendations

1. Look for smaller ways for members to volunteer their time.
2. Provide notice of micro volunteering opportunities to the Section members at-large, not just the Section Council.
3. Make micro volunteering engagements entertaining or personally/professionally rewarding for members.
4. Follow up with your micro volunteers after their volunteer opportunity as a thank you, in order to obtain feedback and to keep them engaged.

Best Practices

Micro volunteerism creates engagement paths which are bite-sized, on-demand, no long-term commitment actions that benefit a worthy cause. Micro volunteerism is sometimes referred to as “accessible volunteerism.”

Micro volunteerism tasks are:

- Often not time-sensitive;
- Can be virtual or take place where the volunteer is or is going;
- Accessible volunteering with opportunities available when I’m available;
- Discreet or small tasks; and
- Can be short-term, limited time commitment, or episodic.

People today are busy, especially young lawyers. They are having to meet billable hours as well as raise families, accommodate debt obligations, and/or work towards higher career goals. It is not that they do not want to volunteer, but rather that the time commitment can be daunting. The key is to make the commitment less overwhelming while still having some benefit for the volunteer. Something that would take a few hours and allow them to get their name out there with a newsletter article or make a good contact through monitoring the community for a week. For other ideas on ways to micro-engage volunteers, refer to the Ongoing Engagement Best Practice.

As your Section generates micro volunteers, please share opportunities and successes your Section has had in engaging those volunteers through highlighting

member engagement in Section newsletters, or through submission to the Around the Bar Section of the *Colorado Lawyer*.

Micro-volunteer opportunities can be posted or members can be matched with an opportunity through our Volunteer Module on CBA Thrive.

BEST PRACTICES FOR MEETING PROTOCOL

Checklist of Recommendations

1. Prepare for Section Council meetings in advance.
2. Incorporate virtual attendees into the meeting by encouraging them to participate by video.
3. Ensure the Section bylaws allow for electronic voting.
4. Take proper minutes of each meeting.

Best Practices

This Best Practice acknowledges that regular Section Council meetings can be improved upon by being cognizant of Section members attending in person, as well as those on the phone, and that everyone's time is valuable. A Section should optimize interaction with Section Council meeting attendees.

Meeting Planning

The key to running a successful meeting is planning.

- Send out plenty of reminders for meetings.
- Get materials out to the attendees in advance of the meeting.
- Always have an agenda.
- Keep the meeting on topic and assign a timeline for the agenda.
- Be familiar with all issues being discussed to keep the meeting moving.
- Follow-up with anything immediately after the meeting.
- Make sure to include those attending the meeting virtually.

Virtual Attendance

The CBA is always looking for better ways to involve non-metro area members. The Best Practice is that any member participating virtually does so by Zoom. Phone-in only should be discouraged. The technology works much better when you connect online or via the app. The sound quality is better for both those in the room and those on Zoom. We also recommend that everyone share their webcam so everyone can see each other. This makes for a much better meeting. We are also able to record meetings via Zoom as well as webcast CLE programs.

It is the responsibility of the Section Chair to ensure that remote attendees are involved in the meeting to the extent possible. This may be as simple as checking-in with those on the phone every few minutes to be sure that they are heard. Using the video option prevents everyone on Zoom from talking at once and allows everyone to participate seamlessly.

Electronic Voting

Sections must incorporate the ability to electronically vote into their bylaws. Electronic voting can be helpful for voting matters that arise between Council meetings, and which may require a quick response. Voting, including the sending and/or return of ballots, voting information and any other writing or action required within any voting process may occur in electronic or other written or perceivable form and may be delivered by hand or via U.S. Mail or by electronic mail or other medium which is retrievable and perceivable in electronic form and capable of retention by the recipient at the time of receipt. Pursuant to the Americans with Disabilities Act, any person requiring a paper ballot as an accommodation shall notify the Council Chair and shall be provided a paper ballot.

Meeting Minutes

Meeting minutes are an important part of the meeting process. They help maintain an accurate record of the business that has been conducted and a to-do list for future meetings.

- Meeting minutes should reflect what was DONE at a meeting rather than what was SAID at a meeting.
- Minutes should follow the agenda.
- Keep track of any motions and votes taken. It is not necessary to name names, but that may be helpful for certain meetings.
- Always send the final minutes to your section liaison. They are responsible for keeping accurate records of all section business.
- Meeting minutes should include:
 - Section or committee name
 - Date and time
 - People in attendance (don't forget the virtual participants)
 - Approval of prior minutes
 - Committee reports
 - New business
 - Adjournment
 - Secretary's signature

BEST PRACTICES IN SECTION COORDINATION

Checklist of Recommendations

1. Ensure all Section leadership attends the Section trainings.
2. Organize questions your Section would like to include in the annual Section Survey.
3. Seek our resources for your Section Council on the [Best Practices Resource Page](#).

Best Practices

The CBA is working diligently to create resources to help Section leaders coordinate and stay in touch with other Section leaders. Some of these are already in use and others are being built.

Section Summits

The first Section training was held in November of 2016, and the second in May of 2017. There was great response and participation from all the Sections. The ideas generated at the trainings helped launch the creation of this Best Practices Playbook. It is the recommendation of the Sections Best Practices Committee that a Section training be held at least annually, going forward.

A further recommendation is that the annual Section training be held in the Summer of each year to get feedback from all the Sections regarding the work being done and what the Sections need to assist and support their improved practices. The timing is deliberate to facilitate Section leadership “hand-off” and the current and incoming leadership will participate. This event will require mandatory participation from all the Section leadership to be successful.

Section Surveys

In January 2016 and again in February 2023, the CBA sent out a membership survey to the entire CBA membership. In addition to more CBA wide questions, the survey covered Section diversity, participation, and satisfaction. The Best Practice going forward will be to send a brief survey out to each Section’s membership with the same 4-5 general questions that will enable us to track Section satisfaction. Additionally, Section leadership may submit questions they have developed and want

to add to the survey to obtain feedback, for example, developing programming and events.

Best Practices Resource Webpage

There is a Best Practices Resources webpage where Section leaders can find the Best Practices Playbook and its appendices, sample documents, leadership contact information as well as anything else deemed useful to the Section leadership. This page shall be maintained by the CBA and will be regularly updated. If there is anything that a Section feels should be on this page as a helpful resource to all Sections, please contact Amy Sreenen at asreenen@cobar.org and she will get it posted or created.

BEST PRACTICES IN ONLINE COMMUNITIES

Checklist of Recommendations

1. Be sure your Section Community is being used.
2. Create and upload an automated welcome letter for new section members.
3. Create engagement with event invites and other relevant posts.

Best Practices

Higher Logic is a software company that provides online community sites including the site used by the Colorado Bar Association and CBA-CLE. Online communities allow companies and organizations to build bridges between varieties of sources including organizations and members. It helps promote engagement, comradery, collaboration, connectedness, familiarity and more. CBA Thrive is the CBA and CBA-CLE community site. There is an Open Forum that all CBA members belong to (but can opt out of) and each section has its own community as well.

Usage Audit

Annually there will be an audit of communities to gauge usage and interest level. Any community that is dormant will be subject to sunset. The Section Executive Council will be notified if this is a possibility and will be given the opportunity to decide if they want a 3-month trial to rejuvenate the community. If a community has been sunsetted and an Executive Council would like to bring it back as a section benefit, the council needs to commit to a year of active participation in the community.

Welcome Messages

Welcome messages can and should be automated from the community site; meaning they are set and forget because the software will send the message automatically. These messages are sent to new members of the section. Messages can have hyperlinks but no attachments. These letters should be updated regularly to include the latest and greatest information about the section. Most liaisons don't have the ability to upload these messages so a super admin needs to be contacted and can set this up. Your liaison can facilitate this process. Please be patient!

Events and Engagement

Invite your members to events! Because the virtual environment crushes spatial barriers it is perfect for putting yourself out there to personally invite section members to events. Our research has shown a significant increase in attendance when posted to a community. Posts from one of the members of the executive council about events is a good way to make people feel more comfortable attending an event. Be creative! Include pictures and videos to entice section members to the event. Make it fun and appealing. Section liaisons can send a personal invite to all members of the section on behalf of someone from the executive council. This should NOT be used for every event but should be used for important or large events.

Engage! It is important for Section leadership to be engaged. Engage your section and let them know who you are. Start an introduction thread in your section community where you can introduce yourselves and you can welcome section members to introduce themselves. Don't be afraid to be a section advocate! The large Open Forum is often used to find answers that a section could easily solve. Make sure you use the Open Forum to the section advantage and let members know what the section is all about. After an event you can always reach out to an attendee through CBA Community. Connect by sending a message, adding them as a contact or @mention them as a reply to your invitation post for the event.

Gamification

Create a gamification campaign for your section. Gamification is a digital technique used to encourage engagement. Often it is a contest that includes recognition, this is especially engaging to those people who are located outside of the Metro area. Ribbons and badges can be created for section members on CBA Thrive to recognize these accomplishments. Liaisons can help get these ribbons created and awarded. Ribbon and badge ideas include:

- Offer a ribbon or a badge for anyone who attends a big event.
- New section member ribbon.
- Monthly section spotlight
- Quarterly active user ribbon
- It is up to the section to decide how to use this to keep people involved.

BEST PRACTICES IN POLICIES & PROCEDURES

Checklist of Recommendations

1. Include all equity, diversity, and inclusivity recommendations in section governance.
2. Follow guidelines outlined in the Unlawful Discrimination, Harassment, and Retaliation policy.
3. No section may take a publicly shared position on any matter without the approval of the CBA Executive Council.

Best Practices

All sections shall follow the CBA policies and guidelines with regard to:

- Positions
- Statements
- Actions
- Recommendations
- Discrimination
- Harassment
- Retaliation
- Equity, Diversity & Inclusivity

CBA Executive Council Process

Section 11.3 of the CBA bylaws states:

11.3. Authority. No action, consent, approval, resolution, recommendation, report, or statement of any Section or committee shall be binding upon the CBA, be deemed to be the act of the CBA, or be publicized as coming from the CBA unless formally adopted or ratified, by the Executive Council.

No section shall take a position, make a public statement, support, oppose or recommend anything under the CBA or the section name without having taken the matter to the CBA Executive council for approval and ratification. A member may do any of these things in their own name without reference to the CBA or any section or committee.

Bringing a request to the CBA Executive Council:

- The section council should discuss and finalize any proposal as necessary.
- The matter (other than legislation) should then go to the section as a whole for a vote. It is important to go to the CBA Executive Council with the full approval of all section members.
- The section liaison can get something added to the CBA Executive Council meeting agenda. Please note: The CBA Executive Council meets every other month and the agendas are always full, so be sure to build enough time into your deadline to take the matter through this process.
- The section must appoint someone to attend the CBA Executive Council meeting to present the sections request, answer questions and handle any follow up.
- Any materials the section would like the CBA Executive Council to have must be provided to the section liaison at least 2 weeks in advance of the meeting.
- Once the CBA Executive Council has voted, the matter is considered closed. The CBA Executive council decision may support, oppose, ask for revisions, table the matter or suggest an alternative, among other things.

Unlawful Discrimination, Harassment, and Retaliation Guidelines

The CBA Sections shall follow the same guidelines as the CBA with regard to discrimination and harassment.

As per Section 11 of the CBA bylaws:

11.1. Nondiscrimination Policy. The CBA shall not discriminate in its membership or admission policies in any manner against persons on the basis of gender, race, color, national origin, age, sexual orientation, disability, veteran status, gender identity and expression, or religious beliefs.

11.2. Avoidance of Discriminatory Facilities. The CBA and its Board of Governors, Executive Council, officers, Sections, committees, and other groups shall not use, for any bar-related activity, the facilities of any club or other institution that discriminates in its membership or admission policies in any manner against persons on the basis of gender, race, color, national origin, age, sexual orientation, disability, veteran status, gender identity and expression, or religious beliefs. The validity of any action taken at any such facility shall not be challenged by reason of noncompliance with this provision.

By way of reference, the following is from the CBA employee handbook section *Unlawful Discrimination, Harassment, and Retaliation* and CBA members' behavior must be consistent with these policies.

The Associations have a strong policy against unlawful discrimination, harassment and retaliation toward anyone at work because of his or her race, color, age, religion, veteran status, sex, disability, national origin, creed, sexual orientation, gender identity/expression, or other protected class. The Associations are committed to maintaining a workplace that is free of any such unlawful conduct.

Harassment includes any verbal, physical or written conduct that insults or shows hostility or aversion toward an individual in a way that is protected by law. It includes jokes, verbal abuse, epithets, degrading comments, negative stereotyping, displaying objects and pictures, hostile acts and other offensive conduct.

Retaliation against an employee for opposing unlawful discrimination, harassment or retaliation, for filing a bona fide complaint of discriminatory or unlawful behavior, or for providing information in good faith regarding another employee's complaint, is strictly prohibited.

Because the Associations take allegations of harassment, discrimination and retaliation seriously, we will respond promptly to complaints and where it is determined that inappropriate conduct has occurred, we will act promptly to eliminate the conduct and impose such corrective action as is necessary, including disciplinary action where appropriate.

Equity, Diversity, and Inclusivity

In early 2018, the CBA/DBA Joint Equity, Diversity & Inclusivity Steering Committee was created to forge the Associations' path in these areas. This Committee, chaired by Patricia Jarzowski was comprised of top leaders from across the legal community. The Committee created a four-pillar plan that has been implemented across the Associations. This Committee also created a comprehensive Equity, Diversity & Inclusivity Toolkit for Section Leaders to provide key concepts, practical tools and curated resources for Section Leaders in the following areas.

- Building a Leadership Pipeline
- Messaging, Promoting & Outreach
- Implementing Tools to Succeed
- Accountability – Transparency, Measuring & Reporting Progress

Please read the Action Plan and explore the Toolkit to craft a section plan that will help further the CBA's Diversity Mission and Values Statements below.

Mission Statement

The Colorado Bar Association ("CBA") values its diverse membership and our communities. We are committed to the eradication of racism, discrimination, and any other form of injustice against underrepresented groups. We promote diversity, equity, inclusion and the removal of barriers to success within the CBA and the communities we serve.

Values Statement

The CBA seeks inclusion and equity through broad recognition of diversity, including, but not limited to race, ethnicity, national origin, socio-economic status, gender identity, gender expression, sexual orientation, disability, age, veteran status, geography, political beliefs, ideology, spiritual beliefs, years of practice, and practice settings. We prioritize broad, equitable, and inclusive participation in our membership and leadership. The CBA is dedicated to promoting attorneys of all backgrounds, identities, and circumstances through the removal of barriers to engagement and leadership.

We are committed to actively changing systems, organizational structures, policies, practices, and attitudes, so that power is distributed and shared equitably and inclusively.

Please see the appendices for the full Action Plan.

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Introduction: This is intended as an overview for preparing one- to two-hour practical CLE. The format is informal and smaller in size (limit to 25-50 participants).

Pre-Event Checklist:

- ☐ **Topic, presenter(s), location, date & time are set**
- ☐ **CBA has marketed the event and applied for CLE credit**
- ☐ **Pre-event meeting scheduled with the speaker(s) to discuss general outline**
- ☐ **Micro-volunteers engaged**
- ☐ **Food is pre-ordered and there is a plan for delivery or pickup; case of water**
- ☐ **New member sign-up sheets and promotional materials (shwag) for the event**
- ☐ **CLE accreditation sheets for the event**

Steps:

1. **Choose a topic** – one generally applicable to all Section members.
2. **Select a speaker** - meet with the presenter for lunch or coffee in advance to discuss the format and an outline of the topic the speaker will cover; describe the expected audience.
3. **Location** – preferably where the speaker is located, i.e., the judge/speaker's courtroom.
4. **Scheduling:** Try to schedule the event at least a month in advance to allow sufficient time to promote the event and obtain CLE accreditation. Scheduling the event over a lunch hour seems to work well, e.g., 11:00 – 1:00. An early breakfast CLE is another option. End of the day is not as popular.
5. **Stakeholder(s):** One of the section goals is to increase diversity and work with other groups. Is this an event that can partner with a local or specialty bar? A YLD group? Partnering not only decreases costs, but it helps reach a wider audience of potential section members.
6. **Pricing & Funding:** \$15 - \$30 for CBA Section members; enough to cover the cost of food and beverages depending upon where the event is being held.
7. **Food and beverages:** Check with the host location/presenter for what is allowed. E.g., will the judge allow outside food in his/her courtroom? Can you get past security? An easy way to do this is preorder lunch boxes from Panera or a similar chain. CBA staff can arrange this for you and make the payment. Don't forget drinks – bottles of water are the simplest.
8. **Marketing & CLE Credit:** Once you have all the details of the event, including a descriptive title and a bullet point list of topics, CBA staff can prepare the marketing materials, start promoting, and apply for CLE accreditation.
9. **Introduction and a plug for the Litigation Section:** The Section Council member(s) organizing the CLE should introduce the speaker and topic, and also briefly describe the Section, its goal to improve that practice area, and encourage membership.

Secondary Considerations:

1. **Micro-engagement opportunities:** Do you need help setting up the event, picking up food, greeting attendees? These CLEs are a great opportunity to engage our members with micro-volunteerism. Think about small tasks that we can ask of members/attendees to get them involved. These can be as small as joining our social media sites or writing a small review of the CLE for our newsletter.
2. **Signing up new members:** Bring signup sheets and promotional materials to the CLE. Talk to the attendees and make them feel welcome; invite them to join the Section.
3. **Documenting the event:** Take a few photographs that to use in a newsletter or on social media to promote the section. Get the names of who is in the photos.
4. **Feedback:** Ask members if they liked the event. Ask for feedback from the presenters. Find out ways that we can improve for the next time and share them with the section. Update this document to include what works and what doesn't work.

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- Defame, abuse, bully, harass, stalk, threaten, intimidate, or otherwise violate the legal rights (such as rights of privacy and publicity) of others.
- Publish, post, upload, distribute or disseminate any inappropriate, harassing, profane, defamatory, violent, nude, discriminatory, infringing, obscene, indecent, or otherwise improper material or information.

- Upload files that contain software or other material protected by intellectual property laws (or by rights of privacy or publicity) unless you own or control the rights thereto or have received all necessary consents.
- Create or submit unwanted email, comments, or other forms of commercial or harassing communications (or “spam”) to any other users.
- Upload files that contain viruses, corrupted files, or any other similar software or programs that may damage the operation of another's computer, the Web Site, or Communication Services.
- Advertise or offer to sell or buy any goods or services for any business purpose, unless such Communication Service specifically allows such messages.
- Conduct or forward surveys, contests, pyramid schemes or chain letters.
- Download any file posted by another user of a Communication Service that you know, or reasonably should know, cannot be legally distributed in such manner.
- Falsify or delete any author attributions, legal or other proper notices or proprietary designations or labels of the origin or source of software or other material contained in a file that is uploaded.
- Restrict or inhibit any other user from using and enjoying the Communication Services.
- Violate any code of conduct or other guidelines which may be applicable for any particular Communication Service.
- Harvest or otherwise collect information about others, including e-mail addresses, without their consent.
- Violate any applicable laws or regulations.

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Association OR ANY OF ITS SUPPLIERS HAS BEEN ADVISED OF THE POSSIBILITY OF DAMAGES. BECAUSE SOME STATES/JURISDICTIONS DO NOT ALLOW THE EXCLUSION OR LIMITATION OF LIABILITY FOR CONSEQUENTIAL OR INCIDENTAL DAMAGES, THE ABOVE LIMITATION MAY NOT APPLY TO YOU. IF YOU ARE DISSATISFIED WITH ANY PORTION OF THE Colorado Bar Association WEB SITE, OR WITH ANY OF THESE TERMS OF USE, YOUR SOLE AND EXCLUSIVE REMEDY IS TO DISCONTINUE USING THE Colorado Bar Association WEB SITE.

SERVICE CONTACT: tthomason@cobar.org

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A printed version of this agreement and of any notice given in electronic form shall be admissible in judicial or administrative proceedings based upon or relating to this agreement to the same extent and subject to the same conditions as other business documents and records originally generated and maintained in printed form. It is the express wish to the parties that this agreement and all related documents be drawn up in English.

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YLD Example of New Lawyer Welcome Email

Dear _____,

Congratulations on becoming a member of the Colorado Bar! As Chair of the Young Lawyers Division of the Colorado Bar Association, I am proud to welcome you to our profession.

As a new attorney, I strongly encourage you to become a member of the Colorado Bar Association, Colorado's statewide, voluntary bar association. Being an active bar member is a great way to connect with other practitioners, areas of practice you are interested in, and volunteer. The YLD is home to all lawyers 37 years of age or younger, OR in the first five years of practice. We send a monthly newsletter of social events, networking and educational opportunities, so watch your email inbox closely for updates. You also can stay connected with us by following our [website](#) and [Facebook](#) page.

Please do not hesitate to contact me with questions on how best to get involved with the bar association: Nicole Marie Black, Nicole.Black@lewisbrisbois.com.

Again, welcome!

Nicole Marie Black

Chair, Colorado Bar Association Young Lawyers Division

Handout 4: YLD Example of New Member Outreach Response Email

Thank you for contacting the Colorado Bar Association Young Lawyers Division (CBA-YLD) and thank you for wanting to get involved!

The YLD is always seeking members to assist in organizing, planning, and attending various events and opportunities we put together for our members. We have a number of active Committees I recommend as a great first step. They include: Social Events Committee, Wellness Committee, Law School Outreach Committee, Public Service Committee, and the Professional Development Committee.

To learn more about our Committees, what they are currently working on putting together, and opportunities to get involved, I encourage you to attend our next CBA-YLD meeting on:

Wednesday, February 3, 2016

6:00 -7:10 PM

CBA Offices

1900 Grant Street, 9th Floor

If you have a particular practice area of interest and would like help getting connected to Section Leadership, please let me know your area of interest and the extent you'd like to be involved (e.g., attending a Section Meeting, meeting with a Section Council member, helping plan an event or CLE, getting involved in legislative policy work).

If you have additional follow up questions or are unable to attend this month's meeting, I'm happy to discuss by email as well. Thanks and I hope to see you at a meeting soon!

Nicole Marie Black

2015-16 Chair, CBA-YLD

Voting members of the Real Estate Section Council:

This is a request for an e-mail vote pursuant to Section 11.6(a) of the Bylaws of the CBA Real Estate Section. More background is given below, but the resolution to be voted on is this:

RESOLVED, that the Real Estate Section recommends that the Legislative Policy Committee of the Colorado Bar Association express the Bar's support of an amendment to SB17-215 to incorporate a definition of "standard forms" in substantially the same form as the draft attached hereto (including the hand-written changes).

Members of the Real Estate Section Council are entitled to vote FOR or AGAINST this resolution. Responses must be received by the Secretary (i.e., me) by **6:15 p.m. on Monday, April 17, 2017**. A total of NINE affirmative votes must be received for the resolution to be adopted.

Background

The RESC's Real Estate Broker Sunset Review Bill Task Force has been working with the Colorado Association of Realtors on this "standard forms" language for the amendment to SB17-215. This has been in process for several weeks now. The attached draft is the version that CAR's legislative policy committee approved last Friday. CAR intends to propose this amendment at a hearing on the bill tomorrow afternoon.

As discussed in our last RESC meeting, while we, as real estate lawyers, would probably like to include more detail in this definition (and some other modifications), we have generally concluded that we are not going to get much more from CAR, and without CAR's support, we won't get anything from the legislature. This would leave us with the current status quo – no definition of standard forms. The Task Force agrees that some form of acceptable definition is better than no definition.

As mentioned, this bill is scheduled for committee hearing tomorrow, so the CBA triumvirate needs to act on this today or tomorrow morning – hence the rush to get votes by e-mail. Please review this message and the proposed standard forms definition as soon as you can, and respond today, if possible.

Thank you!

Link	RESC Reviewer	Bill Number	Sponsor(s)	Name	Summary	RESC Reviewer's Comments	Recommended RESC Position	Bill Progress	Action Date	Last Action
https://www.billtrack50.com/BillDetail/773418/3388	Starritt	HB1016	Beth Martinez Humenik (R)*, Lori Saine (R)*, Rachel Zenzinger (D)*	Exclude Value Mineral Resources Tax Increment Financing Division	The bill permits the governing body of a municipality, as applicable, to provide in an urban renewal plan that the valuation attributable to the extraction of mineral resources located within the urban renewal area is not subject to the division of taxes between base and incremental revenues that accompanies the tax increment financing of urban renewal projects. In such circumstances, the taxes levied on the valuation will be distributed to the public bodies as if the urban renewal plan was not in effect.		No Action	Signed	3/8/2017	Governor Signed
https://www.billtrack50.com/BillDetail/773285	Alderman	HB1019	Don Coram (R)*	Property Tax Redemption Third Party Costs	When property taxes are delinquent, a county treasurer issues a tax certificate, which is a lien on the property. The property can be redeemed upon paying the delinquent taxes, interest, and specified publication, abstract, and search fees. The bill now requires the repayment of any amounts paid to third parties in connection with processing the redemption.	My only concern is "amounts paid to third parties in connection with processing the redemption" is ambiguous, but not sure it deems a position be taken by RE section.	Monitor	Signed	3/8/2017	Governor Signed
https://www.billtrack50.com/BillDetail/773410/3388	Arnold	HB1026	Matt Jones (D)*, Jonathan Singer (D)*	Reverse Mortgage Repayment When Home Uninhabitable	Wildfire Matters Review Committee. Under current law, the borrower in a reverse mortgage transaction is relieved of the obligation to occupy the subject property as a principal residence if the borrower is temporarily absent for up to 60 days or, if the property is adequately secured, up to one year. The bill adds a third exception to the principal-residence requirement to cover situations in which a natural disaster or other serious incident beyond the borrower's control renders the property uninhabitable. The maximum time allowable for a temporary absence under these circumstances is 5 years.		Monitor	In Committee	3/15/2017	Local Government Hearing (13:30 4/12/2017 Room 0107)
https://www.billtrack50.com/BillDetail/773297	Cox	HB1035	Not specified	Sex Assault And Stalking Victims May Break Leases	Concerning allowing certain crime victims to break their rental agreements under certain circumstances.		Monitor	Crossed Over	3/29/2017	House Considered Senate Amendments - Result was to Not Concur - Request Conference Committee

Link	RESC Reviewer	Bill Number	Sponsor(s)	Name	Summary	RESC Reviewer's Comments	Recommended RESC Position	Bill Progress	Action Date	Last Action
https://www.billtrack50.com/BillDetail/773464	Dunn	HB1049	Daniel Thurlow (R)*	Eliminate Property Tax Abatement Refund Interest	If property taxes are levied erroneously or illegally and a taxpayer has not protested the valuation within the time permitted by law, then the taxpayer has 2 years from the start of the property tax year to file a petition for abatement or refund. The board of county commissioners is required to abate the taxes, and the taxpayer is entitled to a refund for the incorrect amount and, in some circumstances, refund interest equal to 1% per month. The bill eliminates the refund interest related to a property tax abatement.	I assume this will be of some interest to our section members' clients if it passes.	Monitor	Crossed Over	3/31/2017	House Considered Senate Amendments - Result was to Concur - Repass
https://www.billtrack50.com/BillDetail/786751	Leff	HB1091	James Wilson, Roger Wilson	Tax Credit Employer-assisted Housing Projects	For income tax years commencing on or after January 1, 2017, but prior to January 1, 2021, the bill allows a taxpayer making a donation to an employer-assisted housing project located in a rural area a credit against the taxpayer's state income tax obligations. The bill defines "donation" to mean cash, securities, or real or personal property that is donated to a not-for-profit sponsor that is used solely for costs associated with an employer-assisted housing project located within the state. The bill defines "employer-assisted housing project" to mean down payment assistance, reduced-interest mortgages, mortgage guarantee programs, rental subsidies, or individual development account savings plans that are: Provided by an employer to employees to assist them in securing affordable housing near the workplace; Restricted to housing in geographic areas that are near such workplaces; Restricted to employees in households whose adjusted income is less than 120% of the median income of the geographic area of the household's employer-assisted housing project; and Restricted to housing that is located in a rural area of the state. The bill specifies procedures by which a not-for-profit entity that is a sponsor of an employer-assisted housing project (sponsor) applies to either the Colorado housing and finance authority or a municipality or county finance authority for an award of a tax credit allowed under the bill. The bill also specifies procedures governing an agency's review of the application and the process by which the agency, if it approves the application, reserves tax		No Action	In Committee	3/1/2017	House Committee on Finance Refer Amended to Appropriations
https://www.billtrack50.com/BillDetail/786701	Alderman	HB1095	Jovan Melton (D)*	Service Of Process To Secured Dwellings	The bill sets forth several means by which a process server may serve process on another person when the process server is denied access to the other person's residential community by one or more security officers or security devices. Service of process by any of these alternative means constitutes valid service of process.	Due Process issue; not a real estate issue.	No Action	In Committee	2/23/2017	Judiciary Hearing (13:30 2/23/2017 Room 0112)

Link	RESC Reviewer	Bill Number	Sponsor(s)	Name	Summary	RESC Reviewer's Comments	Recommended RESC Position	Bill Progress	Action Date	Last Action
https://www.billtrack50.com/BillDetail/812972/3388	Calvin	HB1157	Tracy Kraft-Tharp (D)*, Dan Nordberg (R)*, Kevin Priola (R)*	Bank And Credit Union Reliance On A Certificate Of Trust	Concerning reliance by a financial institution on a certificate of trust.		Monitor/Amend	Signed	3/23/2017	Governor Signed
https://www.billtrack50.com/BillDetail/812909/3388	Arnold/Leff	HB1169	Jack Tate (R)*	Construction Defect Litigation Builder's Right To Repair	Concerning a construction professional's statutory right to repair under the 'Construction Defect Action Reform Act'.		Monitor/Amend	Dead/Failed/Vetoed	3/1/2017	House Committee on State, Veterans, & Military Affairs Postpone Indefinitely
https://www.billtrack50.com/BillDetail/834427/3388	Stodden	HB1199	John Cooke III (R)*, Paul Rosenthal (D)*	Foreclosure Sale Processes	The bill excludes information relating to violations of the requirement for a single point of contact or dual tracking from the published notice that precedes a foreclosure sale. The bill also clarifies: That the deadline for a public trustee or sheriff (officer) conducting a foreclosure to continue a foreclosure sale is the scheduled date and time of the sale; and What happens if a foreclosure sale violates an automatic stay under the federal bankruptcy code, depending on whether full payment of the successful bid amount is received by the officer. The procedures that apply if a foreclosure sale is set aside by court order are established to mirror the procedures that follow a rescission of a public trustee sale. In addition, a person rescinding a foreclosure sale is no longer required to send envelopes along with their rescission paperwork.			Dead/Failed/Vetoed	3/8/2017	House Committee on Local Government Postpone Indefinitely

Link	RESC Reviewer	Bill Number	Sponsor(s)	Name	Summary	RESC Reviewer's Comments	Recommended RESC Position	Bill Progress	Action Date	Last Action
https://www.billtrack50.com/BillDetail/858956	Decker	HB1273	Hugh McKean (R)*	Real Estate Development Demonstrate Water Conservation	Current law's definition of a water supply that is "adequate" for purposes of a local government's approval of a real estate development permit merely allows the inclusion of reasonable conservation measures and water demand management measures to account for hydrologic variability. The bill amends the definition to include reasonable conservation measures and water demand management measures to reduce water needs and account for hydrologic variability (section 2 of the bill) and prohibits the local government from approving the permit application unless the applicant demonstrates that appropriate water conservation and demand management measures have been included in the water supply plan (section 3). Current law also requires an applicant for a real estate development permit to demonstrate to the local government issuing the permit: The water conservation measures, if any, that may be implemented within the development; and ! The water demand management measures, if any, that may be implemented to account for hydrologic variability. Section 4 requires the applicant to demonstrate: The water conservation measures that will be implemented within the development to reduce indoor and outdoor demand; and The water demand management measures that will be implemented to account for hydrologic variability.		Monitor	In Committee	3/17/2017	Agriculture, Livestock & Natural Resources Hearing (13:30 4/3/2017 Room 0112)

Link	RESC Reviewer	Bill Number	Sponsor(s)	Name	Summary	RESC Reviewer's Comments	Recommended RESC Position	Bill Progress	Action Date	Last Action
https://www.billtrack50.com/BillDetail/867028		HB1309	Don Coram (R)*, Lucia Guzman (D)*, Dominique Jackson (D)*, Faith Winter (D)*	Documentary Fee To Fund Affordable Housing	Currently, when the total consideration paid by the purchaser in a real property transaction exceeds \$500, the county clerk and recorder collects a one cent documentary fee for each \$100 of such consideration for the recording of real estate deeds or other instruments in writing. Section 1 of the bill raises the fee to 2 cents commencing January 1, 2018. Section 2 specifies that 50% of the moneys generated from the imposition of the total fee must be deposited with the county treasurer at least once each month and credited by him or her in the manner prescribed by law and the remaining 50% of the moneys generated from the imposition of the fee must be transmitted by the county treasurer to the Colorado housing and finance authority (authority) at least once each month to be credited to the statewide affordable housing investment fund (fund). Section 3 creates the fund in the authority. The bill specifies the source of moneys to be deposited into the fund and that the authority is to administer the fund. All moneys in the fund must be expended for the purpose of supporting new or existing programs that: Facilitate the construction or rehabilitation of housing containing residential units designated as affordable housing; and Provide financial assistance to any nonprofit entity and political subdivision that makes loans to households to enable the financing, purchase, or rehabilitation of residential units. The bill defines "affordable housing" to mean housing that is designed to be affordable for households with an income that is: ! Up to 80% of the area median income for rental occupancy; and ! Up to 110% of			In Committee	3/31/2017	Introduced In House - Assigned to Local Government
https://www.billtrack50.com/BillDetail/867014		HB1310	Steve Fenberg (D)*, Dominique Jackson (D)*, Chris Kennedy (D)*	Residential Landlord Application Screening Fee	With respect to an application screening fee that a landlord may charge a prospective tenant, the bill: Limits the fee to cover the landlord's actual costs for a personal reference check or for obtaining a consumer credit report or tenant screening report; Requires the landlord to provide any person who has paid the fee with a receipt that itemizes the landlord's actual expenses incurred. The landlord may provide the person with an electronic receipt, unless the person requests a paper receipt. Requires the landlord to return any amount of the fee that is not used as authorized by law; and Establishes a penalty for a landlord that does not comply with the requirements related to the fee.			In Committee	3/31/2017	Introduced In House - Assigned to Finance

Link	RESC Reviewer	Bill Number	Sponsor(s)	Name	Summary	RESC Reviewer's Comments	Recommended RESC Position	Bill Progress	Action Date	Last Action
https://billtrack50.com/BillDetail/866526		HB1311	Dafna Michaelson Jenet (D)*	Seller's Disclosure Estimated Future Property Tax	For sales of a newly constructed residence, the bill requires a seller to disclose an estimate of future property taxes. The estimate is based on the following factors: The purchase price is the actual value of the real property, including the newly constructed residence; ! The ratio of valuation for assessment is the same as the residential real property set forth for the current property tax year; and The mill levies are the same as those levied by all local governments for the current property tax year that are applicable to the property; except that, if the seller has actual knowledge that the total mill levies will change in the next year, the seller shall use this new amount for the calculation.			In Committee	3/31/2017	Introduced In House - Assigned to Local Government
https://www.billtrack50.com/BillDetail/866513		HB1312	Adrienne Benavidez (D)*, Tony Exum Sr. (D)*	Residential Lease Copy And Rent Receipt	The bill requires a residential landlord to provide each tenant with a copy of a written rental agreement signed by the parties and to give a tenant a receipt for a payment made with cash or a money order. The landlord may provide the tenant with an electronic copy of the agreement or the receipt, unless the tenant requests a paper copy.			In Committee	3/31/2017	Introduced In House - Assigned to Local Government
https://www.billtrack50.com/BillDetail/773291	Arnold	SB009	Larry Crowder (R)*	Business Personal Property Tax Exemption	There is an exemption from property tax for business personal property that would otherwise be listed on a single personal property schedule that is equal to \$7,300 for the current property tax year cycle. The bill triples the exemption to \$21,900 for the next 2 property tax years and adjusts it for inflation for subsequent property tax cycles.	Colorado's business personal property exemption is low. See text of bill and status as of 1.27.17. The creditor-debtor section may want to review.	No Action	In Committee	2/2/2017	Senate Committee on Finance Refer Amended to Appropriations
https://www.billtrack50.com/BillDetail/773465	Arnold/Leff	SB045	Crisanta Duran (D)*, Kevin Grantham (R)*, Angela Williams (D)*, Cole Wist (R)*	Construction Defect Claim Allocation Of Defense Costs	In a construction defect action in which more than one insurer has a duty to defend a party, the bill requires the court to apportion the costs of defense, including reasonable attorney fees, among all insurers with a duty to defend. An initial order apportioning costs must be made within 90 days after an insurer files its claim for contribution, and the court must make a final apportionment of costs after entry of a final judgment resolving all of the underlying claims against the insured. An insurer seeking contribution may also make a claim against an insured or additional insured who chose not to procure liability insurance for a period of time relevant to the underlying action. A claim for contribution may be assigned and does not affect any insurer's duty to defend.		Monitor/Amend	In Committee	2/8/2017	Senate Committee on Business, Labor & Technology Refer Amended to Appropriations

Link	RESC Reviewer	Bill Number	Sponsor(s)	Name	Summary	RESC Reviewer's Comments	Recommended RESC Position	Bill Progress	Action Date	Last Action
https://www.billtrack50.com/BillDetail/777992	Lubinski	SB078	Jovan Melton (D)*, Kevin Van Winkle (R)*	Residential Storage Condo Unit Property Taxation	The bill establishes that a residential storage condominium unit is a residential improvement. This allows the unit to be assessed as residential real property, which currently has an assessment ratio of 7.96%, instead of as nonresidential property, which has an assessment ratio of 29%. A residential storage condominium unit is defined to mean a building that is: A unit under the "Colorado Common Interest Ownership Act"; Used by its owner to store items from or related to the owner's Colorado residence; and ! Not used for storage related to a business. For a property to qualify as a residential storage condominium unit, the owner of the building unit must submit an affidavit of intended use. The property tax administrator is required to establish the form of the affidavit and to prepare and publish standards for assessors to determine whether a property qualifies as a residential storage condominium unit. The bill establishes penalties for a person that knowingly provides false information on the affidavit.	This would allow assessors to tax storage condominium units as residential property rather than commercial property if the owner submits the required affidavit of residential use. A substantially similar bill was introduced in 2016 but was Pl'd in committee (see HB16-1132)	No Action	Crossed Over	3/21/2017	Finance Hearing (13:30 4/10/2017 Room LSB-A)
https://www.billtrack50.com/BillDetail/783719	Pasquini	SB083	Mike Foote (D)*, Daniel Kagan (D)*	Rule Review Bill	Committee on Legal Services. Based on the findings and recommendations of the committee on legal services, the bill extends all state agency rules and regulations that were adopted or amended on or after November 1, 2015, and before November 1, 2016, with the exception of the rules and regulations specifically listed in the bill. Those specified rules and regulations will expire as scheduled in the "State Administrative Procedure Act" on May 15, 2017, on the grounds that the rules and regulations either conflict with statute or lack or exceed statutory authority.	Most identified rules/regulations not extended are outside of the scope of real estate. RESC should monitor to ensure no real estate specific rules are added to the list of rules not being extended. More suited to the Environmental Law Section, there are some very technical rules and regulations regarding the following that will not be extended: (i) oil and gas rules regarding definitions and standards for storage tanks, including UST's; and (ii) water quality rules regarding discharge permits.	Monitor	Crossed Over	2/14/2017	Joint Committee Legal Services Hearing (12:00 4/7/2017 Room 0112)

Link	RESC Reviewer	Bill Number	Sponsor(s)	Name	Summary	RESC Reviewer's Comments	Recommended RESC Position	Bill Progress	Action Date	Last Action
https://www.billtrack50.com/BillDetail/800926/3388	Calvin	SB097	James Coleman (D)*, Beth Martinez Humenik (R)*	Vacated Alleys Presume Included In All Deeds	Under current law, a conveyance by warranty deed carries the presumption that the grantor's interest in an adjoining vacated street, alley, or other right-of-way is included with the property whose legal description is contained in the deed. However, this presumption does not apply to other types of deeds or to a lease, mortgage, or other conveyance or encumbrance. The bill removes the language containing the presumption from the warranty deed statute and relocates it, with amendments, so as to broaden the application of the presumption of conveyance of an adjoining vacated right-of-way to include not only warranty deeds but also all forms of deeds, leases, and mortgages and other liens.		Support	Crossed Over	3/28/2017	House Third Reading Passed - No Amendments
https://www.billtrack50.com/BillDetail/800821/3388	Payne	SB124	Beth Martinez Humenik (R)*, Dominick Moreno (D)*, Dan Nordberg (R)*	Colorado Uniform Trust Decanting Act	Statutory Revision Committee. Section 15-16-919 (2)(j)(I) of the "Colorado Uniform Trust Decanting Act" refers to a second trust when discussing the decanting power of an authorized fiduciary. This conflicts with the uniform law commission's corrected version of the "Colorado Uniform Trust Decanting Act". The bill changes one reference to the second trust to the first trust.	It would appear that this bill has been introduced to, more or less, correct a typo in CRS 15-16-919. The stated purpose is to allow Colorado's statute to comport with the corrected Uniform Trust Decanting Act, but after spending 30 minutes searching for such a corrected act, I cannot locate it on the Uniform Law Commissioners' website or elsewhere. So, I'm not entirely sure as to whether this bill and the purpose behind it are necessary. In any event, this bill would appear to have a de minimis effect on real estate practices in Colorado.	No Action	Signed	3/30/2017	Governor Signed
https://www.billtrack50.com/BillDetail/800905/3388	Sweetser	SB127	Dan Pabon (D)*, Jack Tate (R)*	Originator Exemption Mortgages To Family Members	Current law defines a mortgage loan originator as an individual who offers or negotiates terms of a residential mortgage loan, including to any family member, but there is an exemption for a parent who acts as a loan originator in providing loan financing to his or her child. The bill expands the exemption to include up to 3 loans per year without compensation, other than interest, between family members, and directs the board of mortgage loan originators to define "family member" by rule.	This is the RESC's bill so we will continue to work it through the process. The initial committee vote indicates that the bill will not be controversial.	Support	Signed	3/16/2017	Governor Signed

Link	RESC Reviewer	Bill Number	Sponsor(s)	Name	Summary	RESC Reviewer's Comments	Recommended RESC Position	Bill Progress	Action Date	Last Action
https://www.billtrack50.com/BillDetail/804614	Pasquini	SB129	Jeni Arndt (D)*, Jon Becker (R)*, Jerry Sonnenberg (R)*	Clerk And Recorder Preserve Plats Electronically	The bill permits a county clerk and recorder to preserve an original plat in an electronic format, with the plat scanned at a minimum resolution of 300 dots per inch.	RESC should discuss whether to support and if so, whether an amendment should be proposed for size and legibility of electronically preserved plats.	Monitor	Crossed Over	2/22/2017	Local Government Hearing (13:30 4/19/2017 Room 0107)
https://www.billtrack50.com/BillDetail/804713/3388	Dunn	SB132	Cole Wist (R)*	Revised Uniform Law On Notarial Acts	Concerning enactment of the 'Revised Uniform Law on Notarial Acts' as amended.	Some technical cleanup would be desirable.	Monitor	Crossed Over	3/31/2017	Introduced In House - Assigned to State, Veterans & Military Affairs
https://www.billtrack50.com/BillDetail/804704/3388	Nies	SB140	Jeni Arndt (D)*, Jon Becker (R)*, Jerry Sonnenberg (R)*	Torrens Title Registration System	Beginning January 1, 2018, the bill closes the Torrens title registration system to new applications to register land title in this state.		Monitor	Crossed Over	2/22/2017	Local Government Hearing (13:30 4/19/2017 Room 0107)
https://www.billtrack50.com/BillDetail/804681/3388	Clark	SB154	Cole Wist (R)*	Uniform Unsworn Declarations Act Include Domestic	Colorado Commission on Uniform State Laws. Colorado has adopted the "Uniform Unsworn Foreign Declarations Act", which allows the use of foreign unsworn declarations in a wide variety of situations. The bill expands the uniform law to include domestic unsworn declarations as contemplated by the "Uniform Unsworn Declarations Act".		No Action	Crossed Over	3/22/2017	Senate Considered House Amendments - Result was to Concur - Repass
https://www.billtrack50.com/BillDetail/809005	Arnold/Leff	SB155	Lori Saine (R)*, Jack Tate (R)*	Statutory Definition Of Construction Defect	The bill separately defines and clarifies the term "construction defect" in the "Construction Defect Action Reform Act".		Monitor/Amend	In Committee	2/27/2017	Senate Business, Labor & Technology Committee Hearing (13:30 2/27/2017 Room LSB-A)

Link	RESC Reviewer	Bill Number	Sponsor(s)	Name	Summary	RESC Reviewer's Comments	Recommended RESC Position	Bill Progress	Action Date	Last Action
https://www.billtrack50.com/BillDetail/806564	Arnold/Leff	SB156	Owen Hill (R)*, Lori Saine (R)*, Cole Wist (R)*	Homeowners' Association Construction Defect Lawsuit Approval Timelines	The bill states that when the governing documents of a common interest community require mediation or arbitration of a construction defect claim and the requirement is later amended or removed, mediation or arbitration is still required for a construction defect claim. These provisions are in section 3 of the bill. Section 3 also specifies that the mediation or arbitration must take place in the judicial district in which the community is located and that the arbitrator must: Be a neutral third party; Make certain disclosures before being selected; and Be selected as specified in the common interest community's governing documents or, if not so specified, in accordance with applicable state or federal laws governing mediation or arbitration. Section 1 of the bill specifies that, in the arbitration of a construction defect action, the arbitrator is required to follow the substantive law of Colorado with regard to any applicable claim or defense and any remedy granted, and a failure to do so is grounds for a district court to vacate or refuse to confirm the arbitrator's award. Section 4 of the bill requires that, before a construction defect claim is filed on behalf of the association: The parties must submit the matter to mediation before a neutral third party; and The board must give advance notice to all unit owners, together with a disclosure of the projected costs, duration, and financial impact of the construction defect claim, and must obtain the written consent of the owners of units to which at least a majority of the votes in the association are allocated. Section 5 of the bill adds to the disclosures required prior to the purchase and		Monitor/Amend	Crossed Over	3/14/2017	State, Veterans & Military Affairs Hearing (13:30 4/19/2017 Room LSB-A)
https://www.billtrack50.com/BillDetail/831288	Arnold/Leff/Lubinski	SB157	Jovan Melton (D)*, Angela Williams (D)*	Construction Defect Actions Notice Vote Approval	The bill requires that, before the executive board of a unit owners' association (HOA) in a common interest community brings suit against a developer or builder on behalf of unit owners, the board must: Notify all unit owners; and Except when the HOA contracted with the developer or builder for the work complained of or the amount in controversy is less than \$100,000, obtain the approval of a majority of the unit owners after giving them detailed disclosures about the lawsuit and its potential costs and benefits. The bill also limits the amount and type of contact that a developer or builder that is potentially subject to a lawsuit may have with individual unit owners while the HOA is seeking their approval for the lawsuit.		Monitor	Dead/Failed/Vetoed	3/13/2017	Senate Committee on Business, Labor, & Technology Postpone Indefinitely

Link	RESC Reviewer	Bill Number	Sponsor(s)	Name	Summary	RESC Reviewer's Comments	Recommended RESC Position	Bill Progress	Action Date	Last Action
https://www.billtrack50.com/BillDetail/858662	Sweetser	SB245	Dan Pabon (D)*, Kevin Priola (R)*	Tenancies One Month To One Year Notice	Currently, a tenancy of one month or more but less than 6 months may be terminated by either party with 7 days' notice. The bill extends the notice to 21 days. The bill also requires 21 days' notice for a landlord to increase rent in tenancies of one month or longer but less than one year.		Monitor	Crossed Over	3/30/2017	Local Government Hearing (13:30 4/12/2017 Room 0107)
https://billtrack50.com/BillDetail/867084		SB279	Susan Beckman (R)*, Matt Gray (D)*, Beth Martinez Humenik (R)*, Rachel Zenzinger (D)*	Applicability Recent Urban Renewal Legislation	The bill clarifies the applicability provisions of legislation enacted in 2015 and 2016 to promote an equitable financial contribution among affected public bodies in connection with urban redevelopment projects allocating tax revenues in the following respects: The bill clarifies that a substantial modification of an urban renewal plan (plan) is a proposed modification that substantially changes provisions of the plan regarding land area, land use, authorization to collect incremental tax revenue, the extent of the use of tax increment financing, the scope or nature of the urban renewal project, the scope of method of financing, design, building requirements, timing, or procedure, as previously approved, or where the modification will substantially clarify a plan that, when approved, was lacking in specificity as to the urban renewal project or financing. If the modification is substantial, the modification is subject to pertinent requirements of the urban renewal law addressing modifications. For plans to which a pledge of the revenues deposited into the special fund was made by an indenture or other legally binding document that is separate from the plan itself prior to January 1, 2016, a pledge to secure the payment of refunding bonds is not a substantial modification and is not subject to the modification requirements of the urban renewal law. Not less than 30 days prior to approving any modification of a plan, the bill requires the governing body or an urban renewal authority (authority) to provide a detailed written description of the proposed modification to each taxing entity that levies taxes on			In Committee	3/31/2017	Senate Local Government Committee Hearing (08:00 4/6/2017 Room SCR 357)

Colorado Bar Association

Section Funds Request

1. Please complete and attach to any narrative portion of the application.
2. Name of organization making application
3. Person Submitting application:
4. Address:
5. Telephone Number:
6. Chief Executive Officer (if any):
7. Board Chair: (if any):
8. This proposal meets the following Colorado Bar Association and/or Section Goals:
9. Amount requested: \$
10. Describe the organization, the date organized, its history and its purpose:
11. Describe the project/program to be funded. Please explain how this project relates to the goals of the CBA Family Law Section (see #7 above):
12. Submit the budget for the project/program:
13. Describe the geographic area to be served, and the projected number of people to be assisted:
14. Identify other organizations within the geographic area that provide the same or similar services. Describe any cooperative work:
15. In what ways, if any, does your organization plan to make use of volunteers, or obtain donated goods or matching funds?
16. Describe how the organization will measure the effectiveness of this program/project.
17. Describe the potential service impact if Section funds are not made available.
18. If your organization should receive funds, how will the program/project continue at the cessation of these funds?

19. Please state if your organization plans to submit an application for funding this year to other organizations. If so – please list.



Funding Request

What_____

Why:	How:
Who:	When:

Action Planning Sheet

This is what we are going to do:

This is why we are going to do it:

This is how we will measure our success:

This is what we hope to accomplish:

These are the steps that we will take:

These are the people or entities that we need to communicate with:

These are the opportunities for collaboration:

These are our milestone dates:

This is how we will celebrate success:



Funding Request

Activity or Program	
Goal	Strategy
Purpose	
Expected Outcome-Measure of Success	
Constituency (members, students, etc)	
Collaboration and Partnership Opportunities	
Do we need Board approval? ___ Yes ___ No ___ Don't know	
Resources:	
Volunteers	Financial
Staff	Time
Budget	Are funds budgeted ___ Yes ___ No
What do we need to do in order to be successful?	
Tasks	
Milestones	
Start Date:	Finish Date:
Revenues:	Expenses:

Debriefing Assessment:

Did we meet our objective?
What went particularly well?
What could we do better or differently?
What surprised us?
Did anyone really stand out because of their leadership skills?
Should we do this again? Why or why not?

	Actual	Budget	Actual	Budget	Actual	Budget	Actual	Budget	Actual	Budget	Actual	Budget	Actual	Budget
	08-09	09-10	09-10	10-11	10-11	11-12	11-12	12-13	12-13	13-14	13-14	14-15	14-15	15-16
Expense Items														
Awards	0	300	132	300	0	200	0	0	0	0	220	0	0	0
Travel	1,982	3,000	2,916	3,200	2,444	3,000	690	2,500	3,565	3,800	858	3,000	4,831	5,000
Special promotion	0	0	0	0	0	0	250	0	0	0	0	0	0	0
Postage & handling	0	100	8	0	8	0	7	0	6	0	0	0	0	0
Prof services/	0	0	0	0	0	0	3,079	2,000	734	2,000	3,987	0	0	0
Meals	2,680	4,000	3,372	3,500	1,702	2,500	1,323	2,000	2,438	2,700	2,821	3,000	2,402	3,000
Printing	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Grants	12,000	15,000	21,320	17,000	22,000	18,000	19,500	22,000	17,000	20,000	18,500	20,000	17,000	17,000
Public Relations	0	10,000	0	0	0	0	0	0	0	0	0	0	0	0
Special Projects	0	500	0	0	0	0	0	0	0	0	0	0	0	0
Telephone	167	300	259	300	163	300	141	200	284	300	196	300	187	300
Administration	8,125	8,500	8,130	8,200	7,830	7,800	7,675	7,675	7,640	7,700	7,770	7,800	7,810	7,800
Misc.	11	1,000	45	1,000	20	1,000	25	500	50	500	0	0	0	0
Total Expenses	24,965	42,700	36,182	33,500	34,167	32,800	32,690	36,875	31,717	37,000	34,352	34,100	32,230	33,100
Total Income	32,020	30,540	31,765	29,500	30,380	28,000	29,325	29,325	30,325	28,114	29,349	29,000	29,415	35,000
number of members	1,625		1,626		1,566		1,535		1,516	1,405	1,467	1,450	1,471	1,400
Balance for the year	7,055	-12,160	-4,417	-4,000	-3,787	-4,800	-3,365	-7,550	-1,392	-8,886	-5,003	-5,100	-2,815	1,900
Amount carried forward	53,986	61,041	61,041	56,624	56,624	52,624	52,837	52,837	49,472	49,472	48,081	43,078	43,078	40,263
Year end Balance	61,041	48,881	56,624	52,624	52,837	47,824	49,472	45,287	48,080	40,586	43,078	37,978	40,263	42,163

**Colorado Bar Association
Real Estate Section
Council Member and Liaison Travel
Reimbursement Policy**

The Real Estate Section of the Colorado Bar Association (the "Section") recognizes that the Section and its members benefit from geographic diversity among the members of the Section Council ("Council Members") and Section liaisons ("Liaisons") and from attendance by Council Members and Liaisons at Section-sponsored events in various areas of the State. The Section also recognizes that all Council Members and Liaisons contribute their time and experience in many ways, and do so without expecting compensation.

This travel reimbursement policy addresses the most common scenarios and issues for travel-related expenses incurred by Council Members and Liaisons. Other situations will be addressed by the Chair of the Section, in consultation with the Treasurer of the Section, in accordance with the spirit of this policy. In all cases, travel expenses for which reimbursement is sought must be reasonable, considered in light of the circumstances that called for travel and the fact that the Section has no resources beyond the voluntary dues paid by its members.

General Guidelines:

A. Travel for which expense reimbursement is sought must have been approved in advance by the Chair, except that travel to attend regularly-scheduled meetings of the Section Council at the Colorado Bar Association's office is automatically approved for any Council Member and Liaison who is required to travel more than 50 miles to attend the meeting. A Council Member or Liaison who is within 50 miles of the CBA offices for personal or for non-Section business reasons on the day of a Council meeting should not request reimbursement for travel to the meeting.

B. Each Council Member and Liaison is responsible for his/her own expenses and should not seek reimbursement for the expenses of others, including family members, employees, volunteers or contractors.

C. Requests for reimbursement must be submitted on a form approved by the Treasurer and be accompanied by supporting evidence of the cost incurred by the Council Member or Liaison (e.g., receipts and verifiable calculations of mileage).

D. Travel reimbursement requests should be submitted to the Treasurer promptly after the relevant meeting or event. Requests received more than 30 days after the meeting or event may be rejected.

E. No reimbursement for transportation expense will be approved unless the Council Member or Liaison has traveled 50 miles or more to attend the meeting or event. Reimbursement for one night's lodging expense is appropriate if a Council Member or Liaison would need to travel 100 miles or more from home to attend a Council meeting or other Section event, or to reach home after a Council meeting or other Section event. The Chair may approve reimbursement for lodging expenses, including an additional night's lodging, in appropriate circumstances such as inclement weather that makes travel hazardous.

F. Council Members and Liaisons attending the annual Real Estate Symposium are expected to pay their own travel and lodging expenses, except that the Section will pay the cost of a hotel guest room used for the Chair's Reception at the Symposium. This policy does not apply to any expense reimbursement that may be offered by CLE Colorado to faculty or other presenters at the Symposium.

G. Unless reimbursement has been approved in advance by the Chair, travel expense reimbursement will not be provided for meetings or events whose location requires more than three of the Council Members or Liaisons attending the meeting or event to travel 50 or miles to attend.

Reimbursement Categories and Rates:

Mileage: Mileage for personal automobile travel will be reimbursed at the annual mileage rate established by the Internal Revenue Service less the portion of the IRS rate attributed to depreciation (as set forth in the annual Standard Mileage Rate Notice published by the IRS). For calendar year 2018, the rate of reimbursement is \$0.295/mile (calculated as \$0.545 (standard IRS mileage rate) minus \$0.25 (portion of IRS mileage rate attributed to depreciation)). No reimbursement will be given for car services, taxis, Uber/Lyft, or similar chauffeured transportation services. No reimbursement will be made for travel within the Denver Metropolitan Area once a Council Member or Liaison has arrived. Unless otherwise approved by the Chair, reimbursement for mileage is based on the distance between a Council Member's or Liaison's home or office, as reasonably selected by the Council Member or Liaison, and the offices of the Colorado Bar Association, using the most direct route reasonably available.

Hotel: If reimbursement for lodging is otherwise appropriate, the amount requested for any night should not exceed the nightly charge, including taxes and parking charges, at a hotel catering to business travelers near the location of the meeting or event. (For example, at the time this policy is adopted, and for purposes of a meeting at the Colorado Bar Association's present offices at 1900 Grant Street in Denver, the Warwick Hotel in Denver would provide a reasonable basis for determining an acceptable reimbursement rate.)

Meals: No reimbursement is given for meals.

Parking/Tolls: No reimbursement shall be given for parking charges or tolls. This does not apply to hotel parking charges that are included in reimbursed lodging costs, or to any parking validation offered by the Colorado Bar Association for parking at the bar association offices. Parking tickets and traffic fines will not be reimbursed.

Airfare: Except for exceptional circumstances approved in advance by the Chair of the Section, no reimbursement shall be given for air transportation.

CBA Thrive

Terms and Conditions

CBA Thrive is intended to elevate the legal body in Colorado by creating an inclusive online environment. This virtual common ground allows members to seek advice, exchange information, develop relationships, collaborate and enjoy comradery through an open exchange that not only educates but hopefully adds levity and social connection.

CBA Thrive relies on its members to become a vibrant engaged online forum, but it is important to establish a positive tone. By participating in Thrive you are agreeing to the following rules and etiquette guidelines. CBA reserves the right to revoke or suspend access to anyone who does not abide by the rules and guidelines.

- Be nice. The golden rule applies: treat others the way you would like to be treated.
- Thrive is not private or confidential. Other participants of Thrive have the right to reproduce postings in accordance with the legal guidelines below.
- Share don't sell especially when responding to a request for a recommendation.
- Do not use Thrive to promote your business or services.
 - Members may respond to referral requests if their practice area matches the request. It is preferred that members respond via private message rather than in the thread.
 - Members will not start new posts asking for members to refer business to them or make firm/business announcements.
- Make your posts accessible for all readers.
 - Use uppercase, bold, italic and color text sparingly
 - Use text instead of an image of text
 - Do not include unnecessary images. If an image must be added it must have an image description/alternate text to describe the image.
 - Use center-aligned text for headings only, all other text should be left-aligned.
 - Use the formatting tool for numbered lists and bulleted lists instead of adding these manually.
- Share your opinion without personally attacking your fellow members.

- Exhibit decorum while posting.
- Post to the appropriate community. Site administrators may move the post to a different community if appropriate.
- CBA reserves the right to delete posts that are deemed inappropriate. The post originator will be contacted in these cases.
- Threads may be closed if they seem to have come to their natural conclusion, for example, thanking the thread.
- All caps reads like yelling, so please refrain from using all caps.
- Posts should add value to the conversation.
- Stay on topic.
- Ignore bad behavior. Site administrators will handle disruptive behavior. If you notice that the behavior persists, please email community@cobar.org with your concerns.
- Avoid redundancy. Try a search before posting questions.
- Ultimately this is your reputation. Keep that in mind before you post.
- Job posts and classified ads are not permitted. The CBA Job Board is available for these posts.

Regarding Political Discussions on CBA Thrive

What is NOT allowed:

- Political campaigning or advocacy for specific candidates or parties
- Promotional content that advances political agendas rather than legal discourse
- Posts that personally attack members based on their political views

What IS allowed:

- Professional discussions about current legal topics, cases, and developments - even when they intersect with political issues
- Sharing legal analysis, interpretations, and professional perspectives on laws and regulations
- Respectful dialogue about how legal changes may impact practice areas or clients

As legal professionals, attorneys recognize that law and politics often intersect, and it's natural for current legal developments to generate discussion. The key distinction is that our platform allows for **professional legal discourse**, not political campaigning or partisan advocacy.

All discussions must maintain the civility and professionalism outlined in our terms - remember to "be nice" and "exhibit decorum while posting." We ask that members focus on the legal implications and professional aspects of topics rather than partisan political positions.

If you're unsure whether a post is appropriate, consider: "Am I sharing legal knowledge and professional insight, or am I advocating for a political position?" When in doubt, err on the side of professional legal analysis.

Our community thrives when we maintain this balance between open professional discourse and respectful boundaries. Thank you for helping us preserve CBA Thrive as an inclusive environment for all Colorado legal professionals.

In addition to the above rules and etiquette, here are the legal guidelines:

1. Thrive is provided as a service of the CBA. The CBA is not responsible for the opinions and information posted on this site by others. The CBA disclaims all warranties with regard to information posted on this site, whether posted by CBA or any third party; this disclaimer includes all implied warranties of merchantability and fitness. In no event shall the CBA or any individual member be liable for any special, indirect, or consequential damages or any damages whatsoever resulting from loss of use, data, or profits, arising out of or in connection with the use or performance of any information posted on this site.
2. Thrive rules and/or disclaimers make no claims to privacy or confidentiality, even if the discussion thread is "closed." Do not post any defamatory, abusive, profane, threatening, offensive, or illegal materials or use profane or unprofessional language. Do not post any information or other material protected by copyright without the permission of the copyright owner. By posting material, the posting party warrants and represents that he or she owns the copyright with respect to such material or has received permission from the copyright owner.

3. The CBA is committed to compliance with all federal and state antitrust laws. In keeping with that commitment, attorneys are reminded that certain topics are not proper subjects for discussion and consideration by and between competing attorneys. Any action taken to eliminate, restrict, or govern competition among members may constitute violation of the antitrust laws. If there is any discussion relating to significant factors of competition, an inference may be made that such a discussion is for the purpose of agreeing upon a common course of business conduct. Among the subjects that should never be discussed are fees; prices; costs; delinquency charges or fees; conditions, terms and prices of service; allocating or sharing customers; or refusing to deal with a particular supplier or class of suppliers. Agreements among competitors relating to any of these subjects may be per se violations of the antitrust laws and can lead to criminal and civil penalties.

Community User Guide

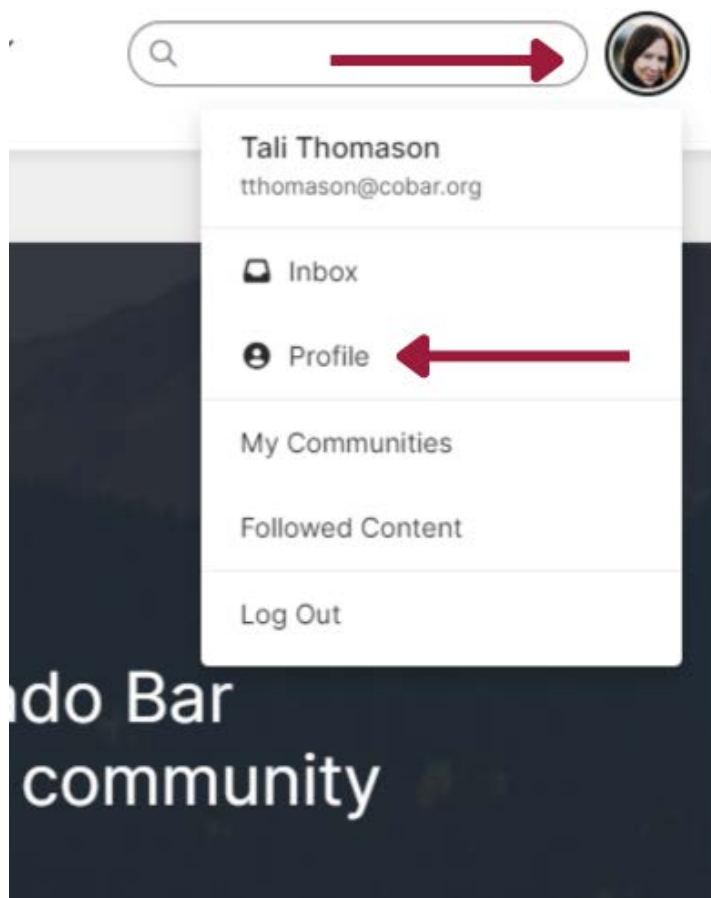
CBA Community is an exclusive online community where members can ask advice, share expertise and connect with other members. Below are steps to help you get started. *If you are not a Colorado Bar Association member you will not have access.

HOW TO LOGIN

1. Go to <http://community.cobar.org> and click the "Sign In" button in the top right corner.
2. You will be redirected to the member login page on the CBA website. Enter your CBA member login information. If you don't know your login credentials, click "forgot username," or "forgot password" in the login box. You can also email membership@cobar.org.
3. When logging into CBA Community for the first time, you will be asked to read and agree to the "terms and conditions".
 - If you are having troubles logging in, try clearing your browsing history or use a different browser.

UPDATE PROFILE INFORMATION

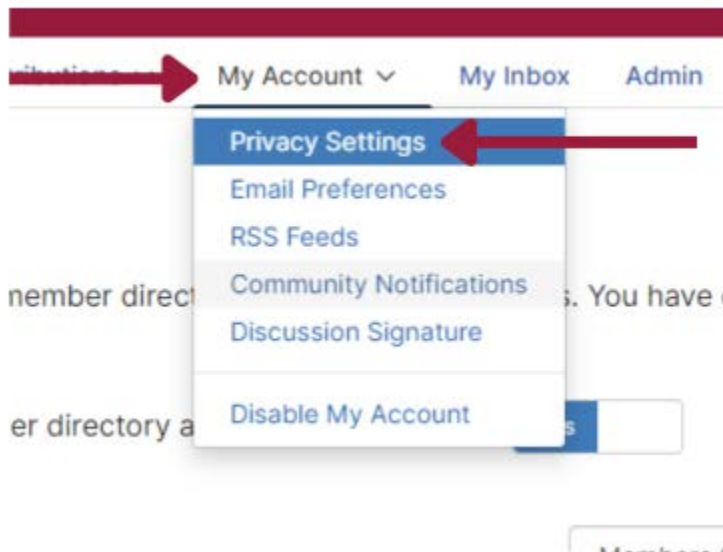
To update your profile, click the drop-down menu in the top right corner and select "Profile". Under the profile, you can add an image, update your community notifications and more.



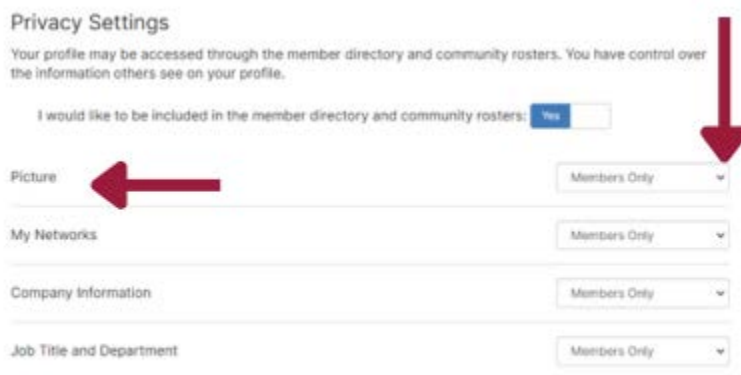
PRIVACY SETTINGS

Once you are in your profile, an important area to update your Privacy Settings. This is where you choose what information you would like other members, contacts or the public can see. All contact information is defaulted to "Members Only".

To access your Privacy Settings, click on the "My Account" drop down menu and then select "Privacy Settings".

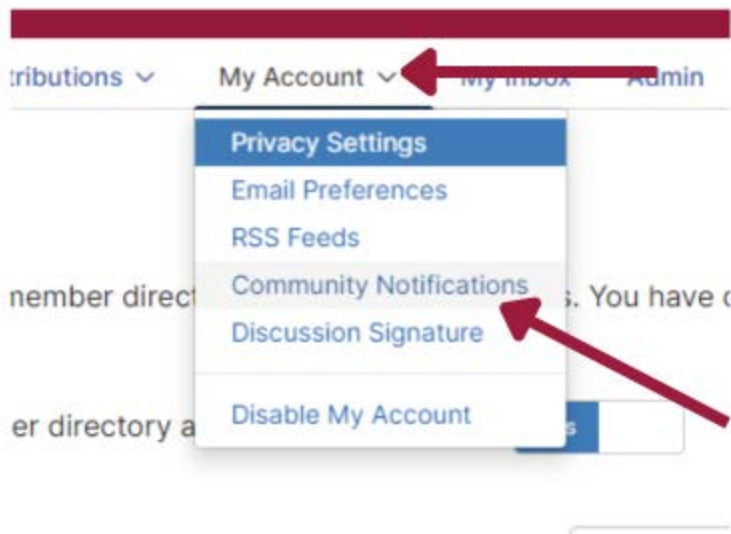


Once in the Privacy Settings section, you can choose which information you would like for people to see by clicking the drop-down menu next to each category:



COMMUNITY NOTIFICATIONS (EMAIL SETTINGS)

In your profile, under the "My Account" options, you can manage your notification settings under the "Community Notifications" option. This will give you control over how you'd like to receive emails from your communities. To access this area, click the "My Account" drop-down and then click "Community Notifications".



There are currently five subscription options:

1. **Real Time:** You will receive the messages to your inbox as they are posted. This is the default for Listservs and was how posts were sent prior to the upgrade to the community site.
2. **Daily Digest:** You will receive one email per day, combining all of the posts made to that specific community for that day.
3. **No Email Notifications:** You will not receive discussion notifications via email. However, you can still access, read and reply to any posts online.
4. **Plain Text:** You will receive an email in plain text as discussions are posted.
5. **Consolidated Digest:** You will receive an email once a day or an email once a week, combining all of the posts made in a consolidated format.

You are currently defaulted to receive the "daily digest". If you would like to change your notification settings, simply click on the drop-down menu to the right of each community you belong to (you can customize for each) and choose which notification option you would like:

Community Notifications

Community notification will be delivered to your primary address:

tthomason@cobar.org

To receive specific community notifications at an address other than your primary, set override(s) where desired.

Daily Consolidated Community Digest: ⓘ

Deliver to your primary address.

Weekly Consolidated Community Digest: ⓘ

Deliver on: Sunday to your primary address.

Discussion Email: ⓘ

You have no override email addresses for discussion emails. [add override addresses](#)

Topic Notifications

You are not currently a member of a topic community.

Notification Settings

☒ Yes

Automatically set community discussion emails to "No Email" when a community is added to a consolidated digest.

30 Communities

Community Name: A-Z

Community	Discussion Email	Consolidated Daily Digest	Consolidated Weekly Digest
Agricultural & Rural Law Section	Daily Digest	<input type="checkbox"/>	<input type="checkbox"/>
Alternative Dispute Resolution Section	Daily Digest	<input type="checkbox"/>	<input type="checkbox"/>
Business Law Section	Daily Digest	<input type="checkbox"/>	<input type="checkbox"/>
Cannabis Law Section	Daily Digest	<input type="checkbox"/>	<input type="checkbox"/>
Civil Rights Section	Daily Digest	<input type="checkbox"/>	<input type="checkbox"/>
Communications & Technology Law Section	Daily Digest	<input type="checkbox"/>	<input type="checkbox"/>

You can also set up an alternate email address, for your notifications that doesn't interfere with the email address you have listed to you receive from CBA and CBA-CLE. Under "Discussion Email" click on the "add override addresses" and enter an email address and pick the community notifications you would like sent to that alternate email address:

Discussion Override Email Address

Enter the email address at which you wish to receive the discussion email for the selected communities. Remove the address to receive the email at your primary address.

Override email address

enter email address

Select community discussions for override address

Select one or more

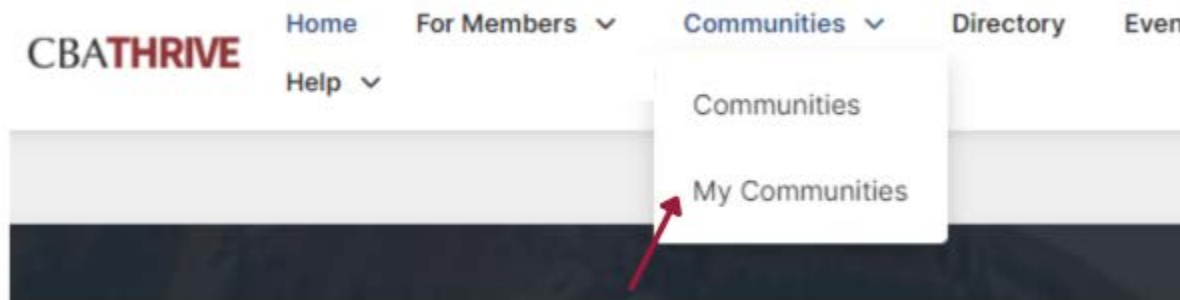
Note: Only communities enabled to allow override addresses appear in the list.

Save **Close**

To receive specific community notifications at an address other than your primary address, you can override the email address for specific communities.

FIND YOUR COMMUNITIES

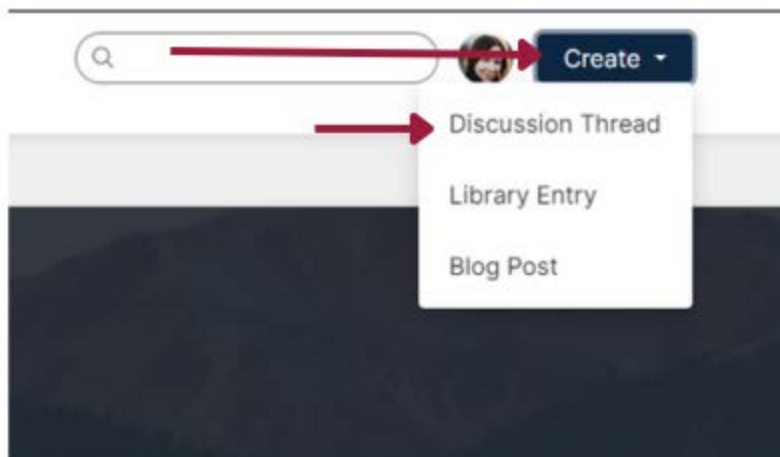
To see all of the communities that you belong to, click the "Communities" drop-down menu and select "My Communities".



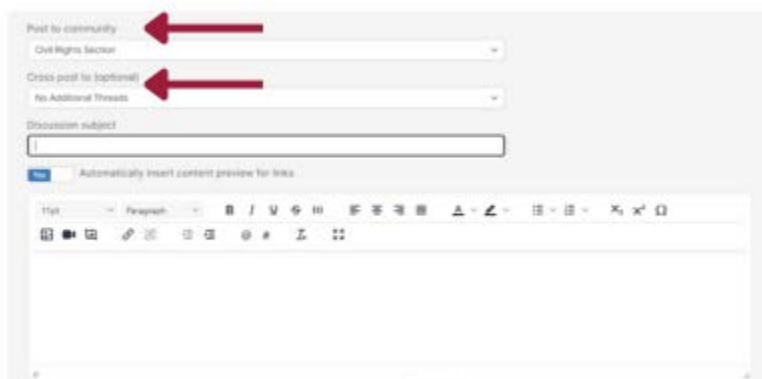
START A DISCUSSION

There are different ways to start a discussion on the site.

1) After deciding what community you want to start the discussion. Go to the community homepage and next to "Latest Discussion Posts" you will see a button labeled "Add". Clicking on the button will pull up the discussion editor where you type and send your message. Note that the "To" section is already populated.



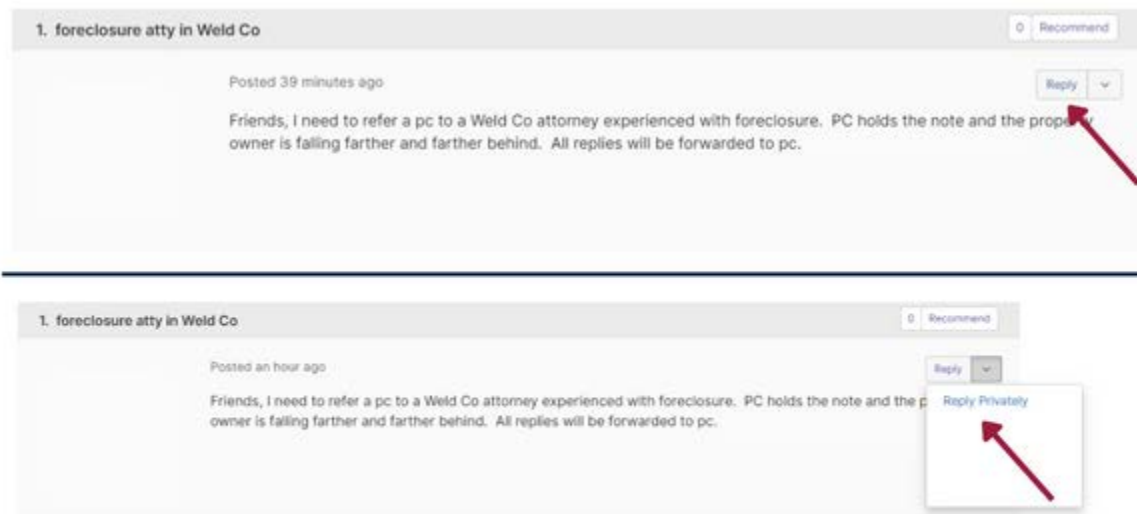
The discussion editor will populate, the "To" will not be populated so you will need to choose the discussion by click, "Select Discussion".



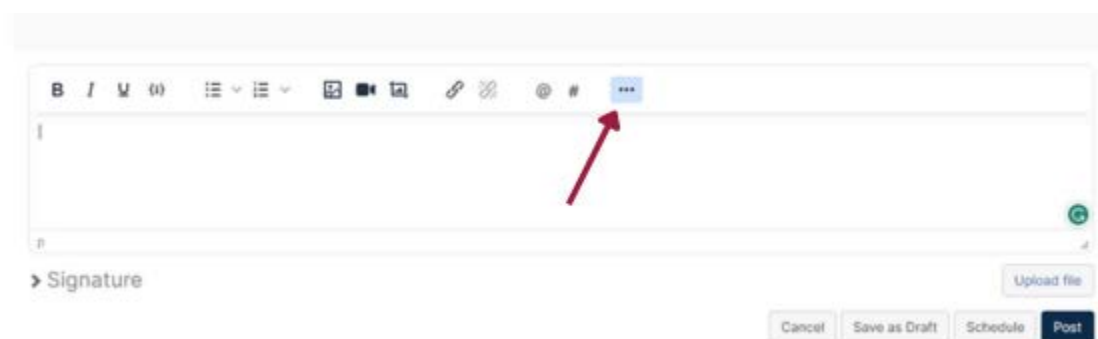
3) On the site landing page, community.cobar.org, you can also start a discussion by clicking the "Add" button. Again, the discussion will not be populated so you will need to choose the community.

REPLY TO A DISCUSSION

To reply to a discussion, select the thread you wish to reply and click "Reply" which allows you to reply to the thread publicly. You can also reply offline privately by clicking on the carrot to the right of "Reply" and selecting "Reply Privately".

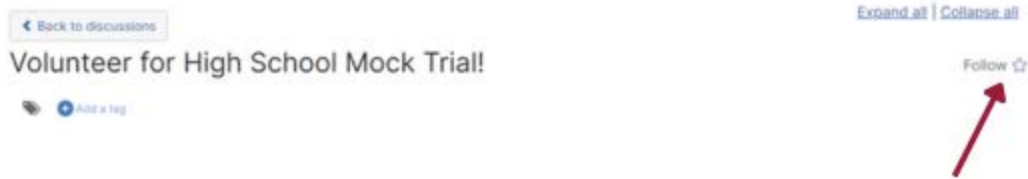


If you want an expanded editor for posting, click the three buttons on the right of the toolbar.



FOLLOWING A THREAD

By utilizing the "reply" option, you will automatically be subscribed to the thread and follow it. To un-follow, once inside the post, click the gray star to the right of the title of the thread and it should switch to an outline which will signify you are no longer subscribed to the thread. Please note, following a Thread enables real-time emails of the discussion and overrides any current communication settings.

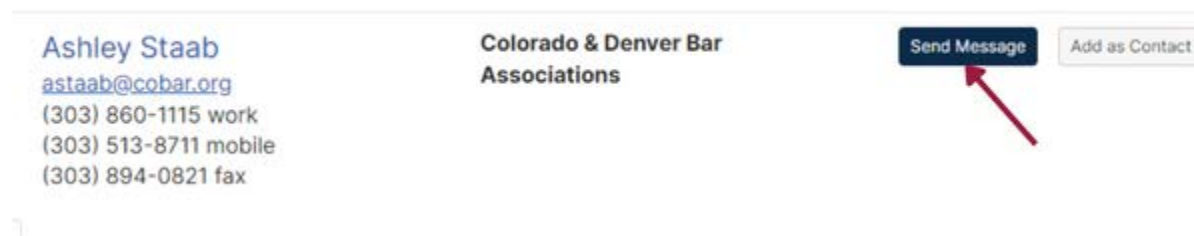


ENGAGING WITH OTHER MEMBERS

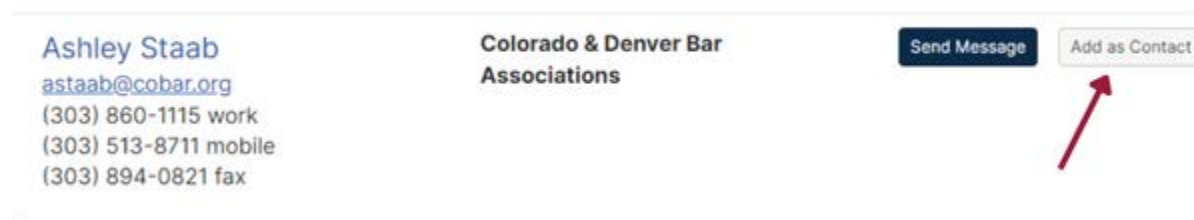
To find specific members, click on the "Members" tab from the individual community home page:



Once you find the member(s) you are looking for, you can send them a message.



You can also add members as Contacts.



Adding contacts creates an organized list in your profile where you can easily access who you are looking for. To add a member, click on the button at the right where it says "Add as

Contact”. That member is now saved in your contact list.

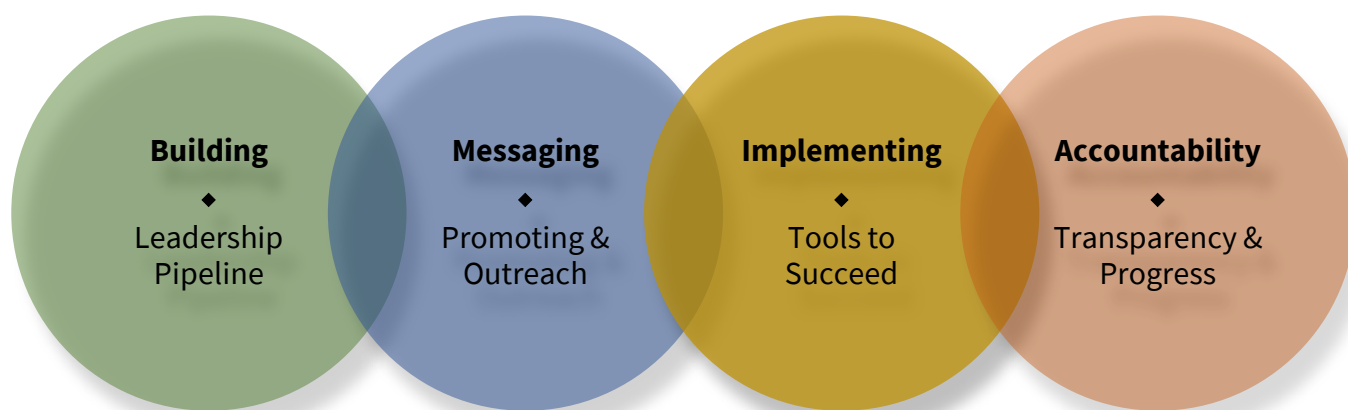
Benefits of Adding Contacts

- From your profile, you have quick access to your contacts’ profile information and the ability to send private messages faster.
- Other members can see who your contacts are, which helps you connect with more members.

NEED ADDITIONAL HELP?

For further assistance, please contact the CBA Community Team at community@cobar.org.

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	Implement ACTNOW Initiative as part of the annual appointment process <ul style="list-style-type: none"> • Update ACTNOW Chart to ensure that Presidential Appointments are transparent and understandable
ACTION 2	Ask diversity bars to inform members of leadership opportunities
STRATEGY 3 Increase the number of diverse leaders so CBA DBA leadership reflects the diversity of the profession in Colorado	
ACTION 1	Ensure candidates on the pipeline list are in the pool for leadership appointments
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	Share tools to help decision-makers promote diverse candidates <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	Identify decision-makers and calendar appointment timelines <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	Contact decision makers to educate about a diverse candidate's qualifications and potential
ACTION 2	Create a process to shepherd interested candidates into bar association governance to help educate applicants about bar operations and to raise their profile <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	Add the names of unsuccessful diverse candidates for leadership positions to the pipeline list

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	<p>Invite leaders, governing bodies, sections, and committees to request specific programming and CLEs, or attend specific Equity, Diversity & Inclusivity programming and CLEs</p>
ACTION 5	<p>Collaborate with community partners like CAMP, CLI, Diversity Bars and CLE on programming</p> <ul style="list-style-type: none"> Publicize and invite CBA DBA leaders to the CLI Inclusiveness Summit
ACTION 6	<p>Utilize education tools and resources available at the ABA Diversity & Inclusion Center https://www.americanbar.org/groups/diversity/</p> <ul style="list-style-type: none"> 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	<p>Ensure the CBA DBA Equity, Diversity & Inclusivity Joint Steering Committee stays educated on current trends and innovative ideas</p>
ACTION 1	<p>Send CBA delegate to annual ABA Diversity Council meeting</p> <ul style="list-style-type: none"> Identify who goes and sponsor the trip Report back to the Joint Steering Committee and Governance
ACTION 2	<p>Monitor and learn from ABA working groups and other organizations on Equity, Diversity & Inclusivity</p> <ul style="list-style-type: none"> 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 <ul style="list-style-type: none"> • 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 <ul style="list-style-type: none"> • 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.



Colorado Bar Association Leadership Application

Thank you for your interest in Colorado Bar Association (CBA) leadership.

Please use this form to provide useful information about yourself
and the reasons for your interest in CBA leadership.
You may attach additional pages if required.

Position Sought: _____

We look forward to learning more about you and your interest in the CBA.

Name: _____

Pronouns: _____

Telephone number: _____

Email address: _____

Colorado Supreme Court Registration Number (if applicable): _____

Are you a member of the Colorado Bar Association? ☐ yes ☐ no

Please describe your interest in this CBA Leadership position.
(please limit your response to no more than 500 words)

Which skills would you like to utilize in CBA leadership? (mark all that apply)

- ☐ Management and governance
- ☐ Strategic planning
- ☐ Financial management
- ☐ Leadership
- ☐ Training
- ☐ Community networking
- ☐ Program development

What additional skills or expertise will you utilize in this position?

Please list any bar associations or other organizations to which you belong along with your role(s) within the organizations.

What would you like to accomplish while serving in this position?
(please limit your response to no more than 500 words)

If you are selected, are you able to commit the time needed to fulfill the requirements of this position?

If you are not selected for the specific position for which you have applied, are you interested in being considered for other leadership positions within the CBA?

Additional Information:

Optional Demographic Information:

Area(s) of Practice: _____

Race, Ethnicity, or Origin (choose all that apply):

- ☐ American Indian or Alaska Native
- ☐ Asian
- ☐ Black or African American
- ☐ Hispanic, Latino, or Spanish origin
- ☐ Middle Eastern or North African
- ☐ Native Hawaiian or Other Pacific Islander
- ☐ White or Caucasian
- ☐ Other _____

Identity/Expression:

- ☐ Female
- ☐ Male
- ☐ Non-Binary
- ☐ Transgender/Gender Nonconforming
- ☐ Other _____

Sexual Orientation:

- ☐ Bisexual
- ☐ Gay
- ☐ Heterosexual
- ☐ Lesbian
- ☐ Other _____

Disability (a physical or mental impairment that substantially limits one or more major life activities):

- ☐ yes
- ☐ no

Do any of these apply to you? (voluntary – may leave blank)

- ☐ Active Military
- ☐ Active Reserve
- ☐ Veteran
- ☐ Not applicable

Required References:

Please list at least one but no more than three persons with knowledge of your attributes as a leader by full name, address, phone number and/or email address.

1. _____
2. _____
3. _____

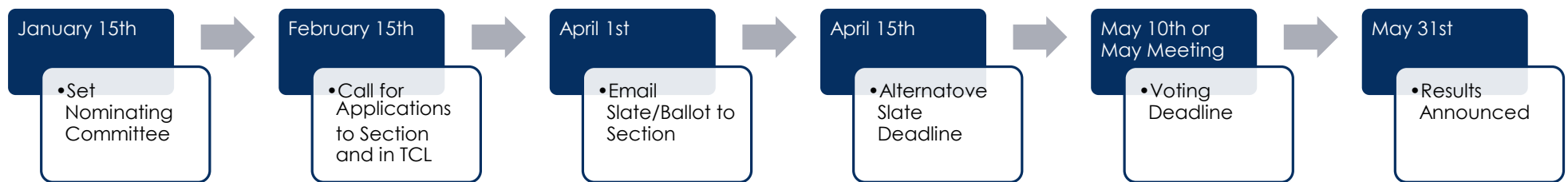
We encourage you to contact your references prior to submitting your application in the event they are contacted.

By submitting this application, you agree that, if selected, you can commit the time needed to fulfill the role for which you have applied, and that you can serve the full term. You also agree that you do not have any conflict of interest in participating in CBA leadership.

Your signature: _____

Date: _____

Election Timeline



SECTION PROMOTION REQUEST FORM

1. TYPE of POST

General post

Event

Other

2. LOCATION of POST

The Loop Weekly Newsletter _____

LinkedIn _____

3. DATES to POST

Start: _____

End: _____

4. CONTENT

a. Headline _____

b. Text (2-3 sentences

c. Link _____

5. Photo/images

Inclusive Communities

TOOLKIT



Create sustainable, rewarding professional relationships



CBA
Est. in 1897
Colorado Bar Association

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INTRODUCTION

The authors of this toolkit strongly believe that everyone deserves a safe, welcoming, inclusive, fulfilling, and connected life. This includes our personal and professional lives, and this toolkit is focused on the latter—though you may find some of our strategies help you in your personal life, too.

In addition to being the right thing to do, prioritizing inclusion and belonging is also wise. When people do not feel valued, included, or connected, their work may be less efficient and effective, and you may struggle to retain valuable talent—whether in a firm, at a nonprofit, or on a volunteer committee. On the other hand, when people feel they have fulfilling professional relationships and do not have to expend time and energy on navigating interpersonal challenges, they can bring their full talents to the work at hand. They will be likelier to feel invested in the organization’s long-term success and stick around for it.

In the legal profession—and the world at large—many structural barriers stand between people and their right to full participation in the community. These include racism, sexism, homophobia, transphobia, ableism (discrimination against people with disabilities), heteronormativity, neuronormativity (the systemic preference for people whose brains function in ways that are considered standard or typical), xenophobia (fear or hatred of immigrants, refugees, etc.), and other systems of oppression. They also include cultural features of our profession, such as the focus on competition and high achievement, elevated rates of substance abuse, and an aversion to frank conversations about feelings and personal experiences.

This document is intended to give you some tools to overcome those barriers and create sustainable, rewarding professional relationships. However, we know that no document can solve all our problems, and only some solutions work for some situations. So, some provisos are necessary before we go further:

This toolkit is drafted primarily from the perspective of peer-to-peer engagement within the legal community—such as volunteer committees, governance settings, etc.—not hierarchical relationships between superiors and subordinates. When formal power structures are involved, we hope you will still find the principles in this toolkit helpful, but they may need to be applied differently. If you are in a subordinate position, this toolkit may give you some valuable ideas on broaching complex topics. Still, it will not tell you how to protect yourself from potential repercussions, navigate HR involvement, etc. If you are in a managerial position, you will need to understand that your position of power may make folks more cautious about sharing with you—we recommend you listen more, speak less, be intentional about creating opportunities for people from underrepresented backgrounds to participate, and respect the boundaries of those working under you.

Likewise, as mentioned above, our relationships are impacted by power dynamics that exist outside of our professional roles—issues like race, gender, disability, immigration status, religion, etc. This toolkit is designed to give general ideas on navigating complex topics and building relationships across barriers, whether those barriers are identity-related or not. Still, it is not intended to be a comprehensive resource on the experience of any particular identity group.



Suppose you have relative social power when interacting with someone with marginalized identities. In that case, that is also a power dynamic you should be aware of and respect. For example, a marginalized person may not feel safe or comfortable opening up to you about their experiences, and they may have very good reasons for feeling that way. Marginalized people may also wish to have some conversations with each other that you're not a part of and may feel they need that space with other people who already "get it." Relatedly, a topic that seems abstract and academic to you may be very personal for them, which you should respect.

Holding these provisos in mind, we hope you find this toolkit helps you build and maintain stronger, better, safer, and more durable relationships within your professional community. We would love to hear from you about how this is going, and as fellow practitioners, we look forward to sharing in the fruits of your labor.

Finally, we thank and acknowledge the many people who taught us the principles in this document and provided feedback on earlier drafts: fellow attorneys, inclusion experts, academics, therapists, friends, and partners, too numerous to list.

BUILDING RESILIENT RELATIONSHIPS

Later sections of this toolkit will guide you in broaching tricky topics with people in your professional network and repairing harm when things go awry. But all that work depends on a foundation of connection, trust, and openness. Without that foundation, assuming good faith and working to resolve conflicts effectively is much more complicated. It may not even feel worth the effort to repair a relationship with someone you never took the time to know and appreciate in the first place.

Over time, lacking community and connection can lead to job dissatisfaction, burnout, and the loss of valuable talent in your organization and the profession. Feelings of exclusion, disconnection, or alienation lead to worse outcomes and higher turnover for people with marginalized or non-normative identities. While fostering connection doesn't require everyone to be friends outside work or go to happy hours, it is worth connecting on a meaningful level.

Therefore, our first advice is to slow down and be curious. That's not something our profession often encourages, but it's worth it. Take the time to get to know the people you work with, whether they are peers, supervisors, subordinates, or work at a different organization. Refrain from assuming any two people are the same or that the way you've always done things is the only way or the best way. Get to know each other's work-related preferences:

- Is this someone who values frequent, informal feedback, or is this someone who prefers to work independently and have more occasional structured check-ins?
- Is this someone who's better at processing information orally or in writing?
- Do they struggle to change tracks out of the blue, or do they welcome interruptions and opportunities for a break from what they're doing?
- Do they have obligations outside work that affect their availability?

When we don't have open conversations about these questions, we often default to norms created by and for abled, white, straight, neurotypical, middle-class or upper-class men living in traditional nuclear families. Those norms don't even work for all such men, let alone everyone else. So, ditch the 'default settings' and find the best collaboration for you and your team.

Consider stepping outside your comfort zone to build deeper connections beyond work preferences, especially with people who may not share your background or social identities.

- Do they have hobbies and interests outside work that are important to their identity?
- Are there things about their life experience that allow them to bring a different, unique, creative perspective to your work?
- Are there areas where they need or appreciate extra care and sensitivity because of their life experiences?
- Are there areas of the work you find challenging but that they love and are happy to step up for?
- Are there ways you can support them better or things you can learn from them?

Not all of these are appropriate questions to ask when you meet someone for the first time, but they're all worth getting to know over time—if the other person is comfortable sharing. Some people are less comfortable opening up, especially before you've built a solid foundation of trust. Others may have prior bad



experiences where they were encouraged to show up “authentically,” but were then punished for showing up a little too authentically. So, respect other people’s boundaries and never try to force them; that can worsen matters.

By investing the time and energy in building a cohesive community of true teammates, you can avoid many problems and tensions before they arise, and you’ll have a better shot at repairing harm and bringing people back together when mistakes happen.

INCLUSIVE TEAMWORK AND MEETINGS

How an organization plans and executes teamwork and meetings will reflect and shape its culture in meaningful ways. While entire books have been written on these topics, the following articles and resources are designed to give a basic overview of strategies to ensure everyone has a meaningful seat at the table and produces the best results for your organization. Only some of these ideas will make sense in every situation, but we hope you find some helpful strategies here.

Planning Meetings

1. **Consider whether a meeting is necessary.** Everyone has experienced the frustration of rearranging their day to attend a meeting that could’ve been an email. This can be more challenging for people with caregiving responsibilities, medical needs, or those impacted by systemic factors that disproportionately affect women and marginalized groups. In addition, some neurodivergent people and introverts find unnecessary “face time” particularly draining. Your colleagues will show up to your meetings more engaged and excited if they know that meetings are reserved for situations where their collaboration, discussion, and engagement are genuinely beneficial.
2. **Invite the right stakeholders.** This goes both ways: avoid inviting people whose involvement is tangential at best, and avoid excluding people who are essential to the decisions you’ll be making. Suppose a particular work group (e.g.,) will be integral to executing your choices. In that case, those work groups should be represented at the table so they can provide input and understand the rationale behind decisions that affect them.
3. **Draft a clear agenda and share it well in advance.** Many people experience anxiety from a lack of structure or clear expectations. In addition, some people prefer time to prepare and will appreciate the opportunity to gather their thoughts or draft written notes in advance. Ensure documents are accessible to people with disabilities (see Appendix A).
4. **Set a realistic duration.** Some people, especially those who are neurodivergent or have specific disabilities, budget their mental energy based on a meeting’s expected duration and may struggle to remain present and engaged in discussions that go beyond the allotted time. Others may become frustrated and feel silenced if important agenda items are not addressed because previous topics exceed the scheduled time.
5. **Ensure accessibility.** All your meetings should be held in locations that are accessible to people with any mobility impairment or physical disability, regardless of whether you know that any attendees are disabled. Audio/video content should include captions, images should include “alt text” (text encoded with an image to describe it for visually impaired readers), and you should provide ample opportunity ahead of time for folks to request any other accommodations they may need. If you are already aware of a specific attendee’s access, support, or accommodation needs, consider proactively communicating with them about how they will be supported.

6. **Be thoughtful about in-person, hybrid, or virtual.** Many people find the benefits of being in person irreplaceable: we can pick up on tone and body language more quickly, and even the tiniest bit of lag or audio degradation can make it harder for folks to converse naturally and fluidly. That said, allowing remote attendance can significantly benefit many, such as those with childcare or other obligations during the workday and those with specific disabilities. Some marginalized people may also benefit from remote attendance if they find the office experience stressful for identity-related reasons.

Starting the Meeting

1. If only some people already know each other, **do introductions.** Encourage folks to share their pronouns along with their name and other relevant information, but do not penalize people or put them on the spot if they don't—it is possible the person is transgender or non-binary and does not feel safe sharing their authentic pronouns in this space, or maybe a second-language speaker unfamiliar with the concept. Some may prefer when introductions do not include icebreaker-type prompts such as “share a fun fact about yourself,” which can activate their social anxiety and distract them from hearing everyone's introduction. In contrast, others may find more information or context helpful. If you're using an icebreaker, consider adding the prompt to the agenda.



2. If this group meets regularly, **establish and periodically revisit norms.** These norms can include things about how the meeting is planned,
 - How do people contribute to the agenda?
 - Can people share written notes ahead of time if they find it helpful?

and how it is executed:

- Who enforces the agenda?
- How do we make sure all voices are heard?

Check in on a scheduled basis, quarterly or annually, to discuss how these norms work and whether they need to be updated.

3. If appropriate, begin the meeting with a **check in or acknowledge complex topics.** This will vary a lot depending on what kind of team you're dealing with, what kind of organization, and what's happening worldwide. Sometimes, it makes sense to begin meetings with a structured check in or acknowledge current events that may impact some folks in the room. Some people show up more effectively once they're allowed to recognize an “elephant in the room,” while others may prefer to stay focused on the task at hand. Refrain from pressuring people to participate in this if they're uncomfortable, and never put a marginalized person on the spot to talk about their lived experience if they have yet to volunteer. Instead, consider making some space to acknowledge the challenges we may be facing.
4. **Be thoughtful about notetaking.** If this is a meeting where taking notes is necessary or appropriate, ask for volunteers or designate a note-taker. Make a point of distributing this labor equitably while also being mindful that it may not be a good task for some due to dyslexia or other barriers. Again, ensure the resulting document is accessible for people with disabilities.

Running the Meeting

1. **Stick to the agenda.** This is important for all the same reasons as setting an agenda. Relatedly, watch the time and try to table less critical details or tangents holding you back from getting through the full agenda.
2. **Watch the style and flow of the conversation.** Allow people to fully express a thought before interrupting to respond. If others interrupt, consider saying something like this: “I’d like to hear the rest of what Sarah had to say before we start responding.” Men disproportionately interrupt women, so be especially attentive to gender dynamics. In addition, some neurodivergent people, people with social anxiety, second-language speakers, and others may find it difficult to participate when people are interrupting each other, even if it feels friendly and collaborative to you. Frequent interruption is part of the standard communication script in some cultures—“collaborative overlap”—while others find it rude, domineering, or exclusionary. This highlights the need to discuss your communication practices openly and nonjudgmentally.
3. **Avoid crosstalk.** When people exchange side comments while another person is speaking, it may show a lack of attention or respect for what they are saying. For people who are deaf, hard of hearing, or have auditory processing challenges, it may also make it impossible for them to focus on what the primary speaker is saying.
4. Take proactive steps to **ensure everyone has an opportunity to participate.** You may perceive a conversation as flowing naturally, but others may be holding onto thoughts or becoming increasingly frustrated that they haven’t had a chance to interject. Gendered expectations, power dynamics, cultural differences, language barriers, and neurological differences may all make it more challenging for some than others to interject during a conversation. If only some people are speaking up, consider pausing to explicitly ask if anyone else has anything to add or go around the room in order.
5. **Be thoughtful about addressing exclusionary behaviors.** Be watchful for any subtle acts of exclusion (also known as microaggressions) that may come up. These include things like racialized comments about people or places, misgendering, ableist language, cultural stereotyping, or normative assumptions about people’s personal lives.



Many marginalized people report that they wish allies stood up and confronted problematic behavior more often so that they don’t always carry the burden (and possible repercussions) of doing so. On the other hand, you may draw attention to someone who doesn’t want it, make matters worse, or misrepresent a particular person or community’s position. In other words, effective allyship sometimes means standing up and sometimes means sitting down. Suppose you need help approaching a situation like this as an ally. In that case, do so with curiosity and humility, don’t assume you know everything, listen to what marginalized people tell you will help them, and avoid putting marginalized people on the spot.

If you are the one who was impacted directly, whether, when, and how to speak up is always your choice, and the later chapters in this toolkit may give you some ideas on how to broach these topics in a way that will land effectively on the listener. In saying that, we also recognize the burden is on others to do better, not on you to make sure you always frame your concerns in the most palatable way for others.

If you realize you made a mistake, it is usually best to acknowledge and correct it as quickly as possible. Belaboring the point or expressing guilt and regret in over-the-top ways can do more harm than good and shift the burden to marginalized people to comfort you. But staying silent can harm, too, when it sends the message that problematic behavior is acceptable.

Addressing these moments effectively is always situational and contextual, and learning how to do so is a lifelong journey. In the Resources section, we've included some content on microaggressions so that you can recognize them more quickly and have additional guidance on when and how you might address them.

6. **Give credit to the contributions of women, trans people, people of color, and anyone with a marginalized identity.** Almost every woman has a story of a meeting where she contributed an idea, but it was ignored until a man repeated it and received all the praise. Many people of color have had their concerns about racism dismissed as overblown until a white person paraphrases them. If you see these things happen, consider interjecting: “Interesting point, Brad. I think Nadia said something similar a few minutes ago—maybe she’d like to elaborate?”
7. **Take breaks.** If your meeting is long (more than 60-90 minutes) or exceeds its scheduled time, offer folks breaks to stretch, use the restroom, or decompress for a minute. Sitting still or remaining engaged for extended periods is more challenging for some bodies and brains than others.
8. **Honor people’s needs.** Allow folks to do what they need to stay present and engaged during a meeting. For example, people may need to stand up and stretch (common for some physical disabilities) or a physical object to play with in their hands (common for some neurodiversity). Make it clear that people are encouraged to do what they need for themselves, and model it by doing what you need for yourself.
9. **Only go overtime with everyone’s agreement.** If you cannot address your entire agenda within the allotted time, check in before the scheduled end time to see what people prefer: to power through, take a short break, or end the meeting and schedule a follow-up. If there isn’t a consensus, end the meeting and schedule a follow-up.
10. **A special note on hybrid meetings.** Do everything possible to ensure virtual attendees are fully included. To the best of your ability, arrange the room in such a way that everyone in person can see the screen on which virtual attendees are displayed, virtual attendees can see everyone who’s in person, and a microphone picks up everyone who’s in person. Be mindful that the loss of body language and eye contact, and the addition of even minor lag times, can make it more difficult for virtual attendees to contribute, so pause the conversation to check in and ensure their voices are heard. If the virtual attendees also have less social or institutional power, barriers to participation may be compounded. If you feel challenged running effective hybrid meetings, consider going all-remote anytime some attendees are remote.

Wrapping up

1. **Do a final check-in around the room.** See if anyone has final thoughts or questions they’d like to share.
2. **Briefly summarize the meeting.** Review key decisions made, next steps agreed to, remaining action items, including who is tasked with carrying out action items and timing, etc., to make sure everyone is on the same page and that the intentions of the meeting are thoroughly carried out.

3. **Thank everyone for their time and contributions and invite them to reach out if they have follow-up thoughts or questions.** Some people prefer time to think and process, may have their best ideas hours or days later, or they may not have felt comfortable speaking up at the meeting. Those people should not feel they “missed their chance” to be part of the process.

After a Meeting

1. **Send meeting notes.** If helpful and appropriate, send notes to memorialize decisions and action steps.
2. **Check in.** If anyone was experiencing barriers to participation or identity-based harms, consider reaching out privately to ask about their experience in the meeting and whether they have anything they’d like to share. Ensure your tone and approach convey that you intend to offer support and foster inclusivity, not to single them out or apply undue pressure. Be mindful of power dynamics or other factors that may affect this conversation.
3. **Address harmful behavior.** If you think anyone is creating barriers to participation or inclusion (intentionally or not), consider reaching out to have a kind but direct conversation with them. See the section above addressing exclusionary behavior and the other sections of this toolkit for some factors to consider. If someone meant well, they ought to be receptive to constructive feedback, but it may need to be framed carefully to be effective.

If you realize you created barriers or acted inappropriately, consider reaching out privately to the affected person or the entire group to acknowledge and take accountability for your mistake. If that harm was directed at a specific person, it is usually best to speak with them privately first so you can handle the situation in the way they would find most helpful.

We hope these guidelines help you organize teams and meetings where everyone is heard and respected. Of course, every team, organization, and meeting is different, so only some of these guidelines apply all the time. Use your judgment and seek input from others when you’re unsure. Focus on progress, openness, and accountability, not perfection.

Key Takeaways

- Communicate at every stage—before, during, and after—to ensure everyone can fully contribute.
- Provide structure (i.e., agendas and time limits)
- Watch to ensure everyone is included in the conversation and find ways to make space for quieter people without putting them on the spot.

DISCUSSING DIFFICULT TOPICS

When faced with participating in a difficult conversation, our inner experiences vary. Some may become energized by the opportunity to set others straight and emerge as the winner. Some may believe others will soon agree if they know what we know. We may feel dread or anxiety. Some of us prefer to avoid difficult conversations, perhaps even tasking someone else with carrying the “bad news.” Do any of these internal states sound familiar?

Difficult conversations can be sources of continuous communication and understanding, just like the headwaters of rivers and streams. Navigating difficult conversations benefits all relationships, including personal, organizational, and larger communities. So, how can we become more willing and skillful?

Why Difficult Conversations are Necessary for Relational Vitality.

As we strive for diversity, equity, and inclusion in our organizations and community systems, we intend to be in relationships with people with life experiences, learning, knowledge, perceptions, viewpoints, and wisdom that are more varied than has historically been included. What is “true,” “common,” or “acceptable” for participants in a diverse group will increasingly expand and diverge. For each member to authentically contribute, conversations that feel initially awkward and tense are critical to facilitate understanding, trust, and continued engagement.

What are we talking about? Difficult Conversations Defined.

A “difficult conversation” can be defined as anything that is hard to talk about^[i] or is a high-stakes conversation characterized by intense emotions, personal blind spots, and mistaken assumptions.^[ii] Navigating difficult conversations requires preparation, self-awareness, practice, and humility. It’s like running the rapids instead of paddling in open water.^[iii] Preparation is needed; getting wet, sometimes soaked, is likely even with intentional preparation.

How do We Skillfully Engage? Preparing for a Difficult Conversation



Assess Personal Readiness and the Basics

The acronym HALT is a starting point for investigating personal readiness. Inner states of Hunger, Anger, Loneliness or Tiredness are stop signs. Before engaging in a difficult conversation, prudently prepare by feeling clear-headed, balanced and well-resourced.

Beyond the essential internal checklist, consider any broader impediments to success: Is this the right time and person?

Shift into a Learning Mindset without Reactivity

Preparation also includes curiosity about what happened (observations) that stimulated reactions, including disruptive feelings. Shifting from an internal narrative about what happened into a curious investigation of what was objectively observable during the exchange may help the shift into a “learning stance” and grow some neutrality, including awareness of the possibilities of gaps in understanding or mistaken intentions.^[iv] Avoid “coloring in” the intent of others with your adverse inferences. Always start with the intention of giving others the benefit of the doubt.

Identify the Unmet Needs and Values Behind the Reactions

Situations that stimulate negative feelings such as anger, outrage, sadness, disappointment, or hopelessness are signs that universal needs and values have not been met.^[v] In preparation, identify unmet needs below the disrupt-

ing feeling, such as annoyance. Is a need to be included unmet? How about respect, appreciation or understanding? Our eddies of emotions help direct awareness to the undercurrent of unmet values and needs. Also, consider the needs behind the desire to be correct. Cultivating awareness of what is happening beneath our surfaces helps us stay centered as the conversation intensifies.



Use Self-Empathy to Generate Understanding and Acceptance of Reactions

Beyond identifying feelings and unmet needs, cultivating empathy for ourselves is essential. From prior experiences, self-identify when you felt less connected with others during conversations and what may have been a cause – defending a position, judging or diagnosing others. We can identify our unpleasant or disruptive emotions and appreciate the cues about unmet needs. Acknowledging that we care about inclusion and respect as central to our core values can help us overcome the inconvenience of feeling annoyed or exasperated. We connect to what is deeply important, expanding our empathy for our whole selves, feeling creatures who also think.^[vi]

Understanding What’s at Stake—Our Identity

The intensity of feelings in the presence of difficult conversations is related not just to our experience of the participants; difficult conversations can disrupt what we believe about ourselves. Such discussions bring forward core identity questions: Am I competent? Am I safe? Do I belong? Am I perceived as trustworthy? Before engaging, explore the connection between fear and core vulnerabilities. Fear of embarrassment may be connected to internal doubts about competency. Fear of dismissiveness or minimization can relate to doubts about belonging and value. Identify judgments and recurring assumptions that we are carrying about ourselves. Considering how we want to be seen or judged by others indicates identity vulnerabilities. Reframe all-or-nothing thinking by adopting the “And” framework: I have competencies and missed something important. I do belong, and I experience events differently from most people. I am valuable, and I am not perfect. I am lovable, and I have contributed to the problem. Gentleness and humility support the process of “complexifying” our identities.^[vii]

Humanizing Participants—Their Identities

Before engaging, assessing what other potential participants may be feeling, how those feelings relate to their unmet needs and values, and how their identities may be implicated is valuable. Stretch your imagination to see with their eyes and hear with their ears. Set up two chairs, sit in one chair, summarize your observations, feelings, and needs, then switch chairs and speak from their perspective.^[viii] In this exercise, we challenge ourselves to suspend our judgments and hold our common humanity as the singular truth. Like us, they want to be valued, belong, and be trusted.

“Empathy is a journey, not a destination.”^[ix] Empathy involves a shift from observing how someone seems on the outside to imagining what it may feel like on the inside, looking at the world through another’s eyes. Authentically trying to understand is the closest we can get—and this effort sends a positive message.

Initiating the Difficult Conversation

Having prepared ourselves by (1) resourcing, (2) inquiring what’s at stake, and (3) humanizing other participants, the next step is initiating the difficult conversation. As we push off, knowing there may be rapids ahead, we focus on the following three purposes that can make a difficult conversation more beneficial: (1) learning more about others’ perspectives, feelings, needs, intentions, contributions, ideas, preferences; (2) expressing our feelings and needs; (3) discovering creative approaches that work for everyone.^[x]

Initiate with the “Third Story”

Every difficult conversation includes what may be initially perceived as the space between us, an invisible “third story.” Consider initiating the discussion with the third story, the one a keen and neutral observer such as a mediator or mutual friend would describe: the differences between the various perspectives without judgment. This can include some guesses without presumption: “My sense is that you and I see the situation of ... differently. I think ... should be done this way, and I’m guessing you think ... is a better strategy. I’m feeling concerned, and maybe you are, too. I’d like to better understand your perspectives and share my own. Would you be willing to set aside forty-five minutes for a discussion when it works for you?” Notice a few things about this opening: (1) invitation to learn; (2) specific requests to set aside time; (3) inviting a joint decision-making process about agreeing to a good time; (4) limiting the effort to a manageable time frame.

Use Active Listening to Learn

Listening well is our superpower to transform a stale conflict into a generative conversation. Listening from a place anchored securely in curiosity with an authentic intention to gain understanding and learn (not to “win a fight”) is the quality of listening that transforms and connects. Be fully present. Ask questions to deepen understanding of observations, feelings, needs, judgments and ideas:

- Can you say a little more about how you see things?
- What information do you have that maybe I don’t?
- What impact have my actions had?
- Can you say more about why you think this is my fault?
- Were you reacting to something that I did?
- How are you feeling about all of this?
- Are you willing to say more about why this is important to you?

Paraphrase back. Ask if there’s more to understand and if anything needs to be included. Remember the first purpose of the conversation: to learn.

Managing Our Sympathetic Nervous System During the Conversation

This kind of listening takes work. It likely will activate our sympathetic nervous system, and we can begin to feel reactive. The main thing is to be mindful of our nervous system. We can notice the rise of activation and employ our personal best calming strategies:

- Slowing our breathing (especially the exhalation)
- Setting our feet on the floor
- Noticing what parts of our bodies are comfortable
- Taking a sip of water and enjoying the coolness
- Scanning the room for pleasant colors or objects
- Speaking/naming the discomfort
- Asking to take a little break

To summarize, recognizing activation, riding the waves, and supporting deactivation are the three components of being mindful of our nervous systems. Feeling activated is entirely natural. The goal is to become more adept at riding the waves. Awareness lends the ability to steer during activation. Creating pauses and using them to ground and lower activation is the interplay. With practice, we trust our growing ability to hear someone else without expecting agreement and without losing our sense that we can also be heard and understood.

Recognize the Limitations of Email and Texting

Email and texting should be used wisely, as they escalate conflict when not used thoughtfully.^[xi] Email and texting can be efficient in confirming simple matters such as the “what,” the “when,” and the “where.” However, neither mode is dialogue—they are serial monologues without tone of voice, facial expression, or body language. We can’t resolve an email conflict with more emails. Better to pick up the phone and call or schedule a virtual or in-person meeting. Before that call or meeting, spend a little time humanizing the participant, since there’s a risk of losing a sense of shared humanity and belief in the possibility of common purposes during email conflicts.

On the other hand, some people—especially some neurodivergent people—prefer written communication. It is vital for those people to feel confident that they have expressed all their thoughts on the topic and that they have done so effectively. If written communication is preferred, one approach is to write out thoughts but not send them to the other person. Instead, ask for a time to talk “live,” using written comments as notes to consult during the conversation. This can reap the benefits of a direct discussion within a framework for being complete and organized. An alternative option is to send the written thoughts and preface them with an invitation to discuss them face-to-face or over the phone once the other person has had a chance to digest them. When receiving this communication, avoid reacting defensively to detailed written comments. Instead, interpret them as a sign that the other person wants to ensure they are thorough and effective. In response, communicate appreciation for the material to think about and request a time for a discussion.

Though written communication can be helpful or necessary up to a point, avoid getting trapped in an endless email back-and-forth that could be resolved with a meeting or phone call.

Taking a Turn—Start with What Matters Most

Having created some goodwill by listening with the intention of learning, we must also speak our truths. Start with what matters most, framed as observations, feelings, needs and specific requests.

Here’s an example:

“When you raised your voice and said ‘you blew it,’ I was surprised and upset. I put several hours of work into preparing to participate in the meeting and wanted to benefit the client. I need to understand why my participation did not meet your expectations so I can learn. I also need a calmer environment to process your input.”

“Rather than reacting at the moment and expressing your concerns, would you be willing to schedule a time for a meeting, so we are calm and ready for such a discussion?”

“Can we schedule a first meeting now? In our meeting, I would appreciate it if you would describe the main 3 things you think I should have done or said differently. Would you also be willing to identify some examples you thought helpful?”

Identify and Value Multiple Strategies

Most disagreements concern attachments to competing strategies. Often, our values are the same. Awareness that a preferred strategy is not necessarily the only strategy and that various methods can be effective can be a helpful mindset. Guiding the difficult conversation into a mutual problem-solving dialogue where brainstorming, learning, commitment to communicating even during difficulty, gaining understanding, deepening connections, and acknowledging progress are our aspirations during difficult conversations. When the conversation(s) falls short, there is still learning, practice, perhaps some goodwill, and an opportunity to request a “do-over.”

“

We can learn to work and speak when we are afraid in the same way we have learned to work and speak when we are tired. For we have been socialized to respect fear more than our own needs for language and definition, and while we wait in silence for that final luxury of fearlessness, the weight of that silence will choke us.

”

— Audre Lorde, *Sister Outsider*



Honor and Celebrate Courage and Engagement

Try to be aware and “right-size” any fear as much as possible. Difficult conversations are often scary. Admit your fears to yourself, try to understand what is at the root of the fear—what’s at stake—and employ self-empathy strategies to create awareness and approach the conversation with curiosity. Maybe it won’t be as bad as your worst expectations? Even if awful, perhaps you will learn.

Our intention with this work is to all engage in difficult conversations, trying our best and celebrating the courage it takes to stay engaged together. Please let us know how it goes!

Key Takeaways

- Difficult conversations deepen understanding if done skillfully.
- Skillfulness during difficult conversations requires preparation.
- Maintaining a learning mindset is critical.
- Honor and celebrate the commitment to engagement.

Sources

[i] Stone, D., Patton, B., and Heen, S., *Difficult Conversations*, 1999, 2010 10th anniversary ed.

[ii] Sofer, Oren J., *Say What You Mean*, a mindful approach to nonviolent communication.

[iii] Id., Ch 13, running the rapids.

[iv] *Difficult Conversations*, Ch. 2, “Stop Arguing About Who’s Right: Explore Each Other’s Stories.”

[v] NVC Academy, *Feelings and Needs Reference Guide*, <https://nvcacademy.com/media/NVCA/learning-tools/NVCA-feelings-needs.pdf>.

[vi] Bolte Taylor, J., *My Stroke of Insight: A Brain Scientist’s Personal Journey*

[vii] *Difficult Conversations*, Ch. 6, “Ground Your Identity: Ask Your Self What’s at Stake.”

[viii] Hidden Brain podcast, US 2.0, “Win Hearts, Then Minds” with Robb Willer.

[ix] *Difficult Conversations*, Ch. 9, “Learning: Listen from the Inside Out.”

[x] *Difficult Conversations*, Ch. 7, “What’s Your Purpose? When to Raise It and When to Let Go.”

[xi] *Difficult Conversations*, “Ten Questions People Ask about Difficult Conversations.”

RESTORING DAMAGED RELATIONSHIPS

In our fast-paced world filled with constant communication, it's easy to forget the profound impact that our interactions can have on others. Whether a casual conversation with a friend or a serious discussion with a colleague, how we communicate can build or damage relationships. The restorative practice encourages positive relationships, repairs relationships when they have been harmed, and creates a professional community based on cooperation, trust, and respect.

Restorative communication is grounded in principles of empathy, respect, and understanding. It seeks to foster meaningful connections and constructively address conflicts. Unlike traditional forms of communication that may focus on blame or criticism, restorative communication aims to promote mutual understanding and reconciliation.

At the heart of restorative communication is the belief that all parties involved have inherent worth and dignity. It emphasizes active listening and the willingness to acknowledge and take responsibility for one's actions. By creating a safe space for open and honest dialogue, restorative communication enables individuals to express their feelings, needs, and concerns without fear of judgment or reprisal.



Key Principles of Restorative Communication

Empathy: Empathy lies at the core of restorative communication. It involves actively listening to the other person's perspective, acknowledging their emotions, and demonstrating genuine concern for their well-being. By showing empathy, individuals can create a sense of connection and understanding, laying the foundation for meaningful dialogue.

Accountability: Restorative communication encourages individuals to take responsibility for their words and actions. Rather than deflecting blame or making excuses, it involves owning up to mistakes and demonstrating a willingness to make amends. Accountability is essential for building trust and repairing damaged relationships.

Collaboration: Restorative communication is inherently collaborative, seeking solutions that benefit all parties. Instead of approaching conversations with a win-lose mentality, it encourages individuals to explore mutually satisfactory outcomes through dialogue and negotiation. By working together, individuals can find creative solutions to complex problems.

Practicing Inclusivity in Restorative Processes

Power and identity dynamics play an important and often unacknowledged role in restorative processes. Reflection on and awareness of these dynamics are critical components of effective restorative communication practice.

Power dynamics can significantly influence how conflicts unfold and are resolved in group and one-on-one settings. In group contexts, individuals in positions of authority or those perceived as having more influence may unintentionally overshadow others' perspectives, making it challenging for all voices to be equally represented. In one-on-one interactions, power imbalances can subtly shape the conversation, impacting everyone's comfort in expressing vulnerability and taking responsibility. When one person holds authority, it may pressure the other to agree or conform, hindering open dialogue. By acknowledging and balancing power dynamics, restorative practices promote fairness, empower all participants to engage honestly, and ensure that solutions reflect the needs and perspectives of everyone involved, not just those with greater authority or influence.

Additionally, effective restorative practices acknowledge that cultural norms influence how people communicate, express emotions, and respond to conflict. Culturally responsive restorative practices recognize and honor the diverse cultural backgrounds and values that individuals bring into a restorative setting. By incorporating cultural awareness and sensitivity, facilitators and individuals can create a more inclusive environment that respects each participant's identity and lived experiences. This involves learning about different cultural communication styles, being aware of potential biases, and adapting practices to meet the group's needs. Culturally responsive approaches enhance trust and engagement and empower individuals to bring their whole selves into the process, enriching the restorative experience and fostering genuine understanding across cultural lines.

Applying Restorative Practices in a Group Setting

Repairing ruptures in group dynamics is essential to maintaining cohesion and trust. Whether caused by misunderstandings, disagreements, or interpersonal conflicts, addressing and resolving issues promptly can prevent them from escalating and negatively impacting group dynamics. In a group context, the dynamics between multiple individuals must be carefully navigated to ensure everyone feels heard, valued, and respected.

Restorative circles

Restorative circles are an essential part of the restorative communication process. These circles bring together the individuals involved in the conflict and other relevant stakeholders to engage in open dialogue and share their experi-

ences and perspectives. Through active listening and empathy, participants gain a deeper understanding of the conflict's impact on each other.

A restorative circle is a space for people to come together and discuss a conflict or problem. Restorative circles resolve disputes through dialogue, which helps people learn from each other and understand each other's perspectives. This is helpful for both sides of the conflict because it allows them to know why they feel the way they do about what happened.

How to Facilitate a Restorative Circle

Participants sit in chairs of equal height arranged in a circle and free of barriers like tables or desks between them, or in other arrangements that feel equitable and inclusive if disabilities or features of the physical space require something different. A facilitator encourages participants to collaboratively identify ways to repair the harm caused by the conflict. This may involve apologies, restitution, or specific actions to rebuild trust and relationships within the group.

In a restorative circle, five themes are employed by the facilitator to support dialogue and problem-solving.

Step 1. What's happened?

Everyone has a different perspective on any given experience or issue. Let everyone express how they experienced what has happened or is happening. Acknowledging harm and recognizing the impact of words or actions that have caused damage or discord within the group is the first step toward repair.

Step 2. Thoughts and Feelings

Thoughts influence Feelings. Invite people to express what they were/are thinking and how they were/are feeling due to these thoughts.

Step 3. Impact and Harm

Conflict and wrongdoing impact people and cause harm; this harm needs to be repaired. Invite each in turn to consider who has been or is being harmed/affected by the situation/event and how. Encourage accountability and responsibility. Offering sincere apologies and taking responsibility for one's actions demonstrates humility and a commitment to restoring trust and harmony.

Step 4. What do People Want?

In the event of harm, everyone involved will have different needs. Invite each in turn to consider what they need now to repair harm/solve the problem, to feel better, and to move on. Taking concrete steps to make amends and rebuild relationships is essential for moving forward positively and rebuilding trust.

Step 5. The Way Forward

Those harmed/affected need to find ways forward for themselves. Invite each in turn to consider how each of the expressed needs can be met, what support they might need to do this, and how they will do things differently. Reflecting on the underlying causes of conflicts and identifying strategies for preventing similar issues in the future promotes continuous learning and improvement within the group.

Best Practices to Support a Culture of Repair

To successfully apply the restorative communication themes outlined above, groups should have best practices to support a culture of repair. Restorative communication is about addressing conflicts after they occur and fostering a culture that prevents conflicts from escalating. By encouraging open exchange, empathy, and respect, restorative communication creates an environment where conflicts are less likely to occur.

Establishing Norms and Guidelines

Setting clear expectations for communication and behavior within the group creates a supportive framework for restorative practices and helps to reduce the opportunity for conflicts to occur.

Facilitated Dialogue

Using trained facilitators to guide group discussions and ensure all voices are heard can help navigate complex conflicts and promote understanding. Knowing your limits as a facilitator is essential for a leader. If you need help with facilitating restorative circles or the conflict involves you personally, consider bringing in an outside expert to assist.

Regular Check-ins and Feedback

Creating opportunities for regular check-ins and feedback sessions allows group members to address concerns proactively and prevent issues from escalating.

Celebrating Successes

Recognizing and celebrating achievements and milestones within the group reinforces positive behavior and strengthens group cohesion.

Applying Restorative Practices in a 1:1 Setting

When conflict arises between individual members of a community, their ability (or inability) to resolve those conflicts can significantly impact the broader community or group. Unlike traditional forms of communication that often prioritize blame or punishment, restorative communication between individuals emphasizes dialogue, active listening, and mutual respect.

In this intimate setting, individuals are encouraged to engage in open and honest conversations, explore the impact of their actions, acknowledge harm, and work towards repairing relationships and restoring trust. Through this process, participants can cultivate deeper connections, resolve conflicts constructively, and ultimately promote personal growth and reconciliation.

How to Facilitate a Restorative Conversation with an Individual

Here are six steps you can take to facilitate a restorative conversation. Remember, these are just suggestions. The most important thing is to convey compassion and authenticity to the other person.

Step 1. Open the lines of communication. (At the right time and in the right place).

Let the person know you will listen to them and their perspectives, then do just that. This is not the time for advice, lectures, or judgment.

Say: “How’s it going? I wanted to talk with you about _____.”

Step 2. Allow them to explain the situation from their perspective.

Try to see the situation from their point of view. Remember that people may often feel very differently about the same event.

Example Questions:

- “What happened?”
- “Can you tell me more about _____.”
- “What were you thinking at the time?”

- “What were you feeling?”
- Actively listen and then summarize what you have heard. “so, what you are telling me is..... Do I have that right?”

Step 3. Identify what led up to the incident and any root causes.

Asking about what happened before or what else may have affected the person’s behavior can help the person gain a greater understanding of the situation.

Example Questions:

- “It sounds like you felt _____. What made you feel that way?”
- “What happened before it started?”
- “What else do you think was going on with _____?”
- “Has this happened before?”

Step 4. Identify the impact.

Help the person see how their behavior affected you or those around them. They may need help understanding consequences they can’t see, such as hurt feelings.

Example Questions:

- “What have you thought about since?”
- “Who else do you think has been affected/upset/ harmed by your actions? How?”
- “When I heard/saw _____, I felt _____ because I _____.”
- “What role do you think you played in this situation?”
- “How do you feel now?”

Step 5. Address needs and repair harm.

Help the person decide how to make things better or solve the problem. Lead them to a resolution they can feel good about, even if it is a consequence.

Example Questions:

- “What can I do to make things better?”
- “If you were _____, what do you think you would need?”
- “What do you need to help you do that?”
- “What would you like to see happen?”
- “What could you do differently next time?”

Step 6. Create an agreement.

This may be a verbal agreement, a checklist, or even a written letter or contract. Remember to follow through on your promises.

Example Dialogue:

- “Based on our talk, I heard that you will _____. I will also _____.”
- “Can we agree on this plan?”
- “I’m going to check on you in a while to see how things are going.”
- “Thank you for sharing with me! I’m so happy we can work together to make things better!”

Best Practices to Support a Restorative Conversation

Active Listening

Pay close attention to the other person's words, tone, and body language. Paraphrase what they've said to ensure understanding and demonstrate that you're fully engaged in the conversation.

Expressing Emotions

Share your feelings openly and honestly, using "I" statements to take ownership of your emotions. Avoid blaming or criticizing the other person, focusing instead on how their actions have affected you.

Seeking Understanding

Ask open-ended questions to gain insight into the other person's perspective. Show genuine curiosity and empathy, demonstrating a desire to understand their thoughts, feelings, and motivations.

Brainstorming Solutions

Collaborate with the other person to generate ideas for resolving the issue. Be open to compromise and flexible in exploring different options until you find a mutually satisfactory solution.

Offering Apologies and Forgiveness

If you've contributed to the conflict, apologize sincerely and take steps to make amends. Likewise, be willing to forgive the other person and move forward with a renewed commitment to communication and understanding.

Conclusion

Restorative communication and repair can transform group dynamics by fostering empathy, understanding, and accountability. By cultivating a culture of open dialogue, collective responsibility, and continuous learning, groups can navigate conflicts and challenges more effectively, leading to greater cohesion, resilience, and collaboration. Whether in professional settings, community organizations, or social groups, practicing restorative communication and repair can create environments where individuals feel valued, respected, and empowered to contribute positively to shared goals and objectives.

Five Key Takeaways of Restorative Communication

- **Empathy and Accountability as Foundations:** Restorative communication builds on empathy and accountability, encouraging individuals to understand each other's perspectives and take responsibility for their actions. This approach fosters mutual respect, trust, and relationship-building, even in professional conflicts.
- **Conflict as an Opportunity for Growth:** Rather than seeing conflict as purely negative, restorative practices view it as an opportunity to strengthen bonds through constructive problem-solving, active listening, and mutual support, which is essential for building a cohesive community.
- **Restorative Circles for Group Healing:** Restorative circles provide a structured approach to resolving group conflicts. By allowing all voices to be heard, these circles promote understanding and collective problem-solving, leading to meaningful resolutions and rebuilding trust.
- **Role of Facilitators in Conflict Resolution:** Skilled facilitators are crucial in restorative practices, especially in complex or high-stakes conflicts and when there is a significant power imbalance among the parties. A facilitator can guide discussions, ensuring that all perspectives are represented, emotions are managed constructively, and the group remains focused on finding a collaborative solution.

- Preventive Culture through Best Practices: Establishing norms, regular check-ins, and celebrating group achievements are best practices that help prevent conflicts from escalating. A culture that values open dialogue and respect reduces the likelihood of misunderstandings and fosters a positive, resilient community.

Sources and Further Reading

This section relies on principles taught in the following books:

Schwarz, Roger. *The Skilled Facilitator: A Comprehensive Resource for Consultants, Facilitators, Managers, Trainers, and Coaches*. Jossey-Bass, 2002.

Zehr, Howard. *The Little Book of Restorative Justice*. Good Books, 2002.

Rosenberg, Marshall B. *Nonviolent Communication: A Language of Life*. PuddleDancer Press, 2003.





CONCLUSIONS AND NEXT STEPS

We sincerely thank you for taking the time to read this toolkit, and we hope it helps you foster a stronger, more resilient community around you.

Changing how we've always done things can be challenging, and it's unlikely to happen overnight or go perfectly every time. We encourage you to emphasize progress over perfection, celebrate your successes, and strive to improve.

To paraphrase a quote by the Black novelist, poet, and civil rights activist Maya Angelou: We do our best until we know better. Then, when we know better, we do better.

In the same spirit, we welcome you to contact our Council if you have feedback on this toolkit and want to share ways that it worked—or didn't—for you or your organization. We intend to build out this toolkit with more resources over time, including shorter summaries and "practice pointers" aimed at specific situations, and we would welcome your ideas for future versions of this toolkit or related projects.

We will build a healthier, more supportive, and more cohesive profession—and world—one step at a time. We are excited to have you with us on that journey.

RESOURCES

Online Materials

Courageous Conversations toolkit from the Social Transformation Project: <http://stproject.org/wp-content/uploads/toolkit-files/courageous-conversations-toolkit.pdf>

Leadership Learned Podcast (from Inspirational Development Group) - How to Have Effective Conversations: <https://www.linkedin.com/pulse/how-have-effective-courageous-conversations-leadership/>

“Inclusive Leadership: The Power of Workplace Diversity,” a course by Dr. Brenda J. Allen: <https://www.coursera.org/learn/inclusiveleadership>

28 microaggression examples at work & in everyday life: <https://powertofly.com/up/microaggression-examples>

Say What? Microaggressions, Your Health and What To Do About Them, <https://www.ucsf.edu/news/2024/05/427501/say-what-microaggressions-your-health-and-what-do-about-them>

Books

“So You Want to Talk About Race” by Ijeoma Oluo

“We Can’t Talk About That at Work! How to Talk About Race, Religion, Politics, and Other Polarizing Topics” by Mary-Frances Winters

“Say the Right Thing: How to Talk About Identity, Diversity, and Justice” by Kenji Yoshino and David Glasgow

“Inclusive Conversations: Fostering Equity, Empathy, and Belonging across Differences” by Mary-Frances Winters

“Think Again: The Power of Knowing What You Don’t Know” by Adam Grant

“Demystifying Disability: What to Know, What to Say, and How to be an Ally” by Emily Ladau

“How to be an Inclusive Leader: Your Role in Creating Cultures of Belonging Where Everyone Can Thrive,” by Jennifer Brown

“Subtle Acts of Exclusion” by Tiffany Jana and Michael Baran

“How to be an Anti-Racist” by Ibram X. Kendi

“White Fragility: Why it’s so hard for white people to talk about racism,” by Robin DiAngelo

Schwarz, Roger. *The Skilled Facilitator: A Comprehensive Resource for Consultants, Facilitators, Managers, Trainers, and Coaches.* Jossey-Bass, 2002.

Zehr, Howard. *The Little Book of Restorative Justice.* Good Books, 2002.

Rosenberg, Marshall B. *Nonviolent Communication: A Language of Life.* PuddleDancer Press, 2003.

APPENDIX A: CBA/DBA ACCESSIBLE PRINT & DIGITAL MATERIALS QUICK REFERENCE GUIDE

Please use the following accessibility tips when creating materials that will be printed and physically posted, digitized and uploaded to web pages, or distributed using email:

Filenames

- When saving a document, use a meaningful filename, e.g. “2025 Fundraising Event Flyer”.
- If recycling another person’s document, check the document settings and change the previous description and author to the current one.

Text

- Use basic, simple fonts (e.g Calibri, San Serif, Arial, or Helvetica).
- Use a font size of 12 or larger.
- Use text instead of an image of text.
- Use UPPERCASE, bold, and italic text sparingly.

Structure

- Create structure using Styles (in Word) or Reading Order (in Adobe Acrobat).
- Every document has one Heading 1 – The Title.
- Main ideas are Heading Level 2, and sub ideas are Heading Level 3.
- Number lists with the formatting tool – not manual numbering.
- Create bullet lists with the bullet formatting tool – not manually.
- Ensure the reading order in a .PDF accurately matches the visual order.
- Use tables for data, not for page layout.

Colors

- Use high-contrast colors between text and background. (e.g. black/white)
- Represent the meaning and significance in text form when colors convey important information
- Download a “color contrast analyzer” from the web when in doubt.