



**LOCAL BAR RESOURCE  
HANDBOOK  
2020**

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## Introduction

Welcome to the Local Bar Resource Handbook. This handbook was created by bar executives for bar executives.

## CBA Contacts and Links to Information

### CBA Contact List

The Colorado Bar Association (CBA) is an invaluable resource for both local bar leaders and for attorneys. There is a wealth of information on the CBA's website, as well as staff equipped to assist you with local issues.

cobar.org  
303-860-1115, Toll-free in Colorado: 800-332-6736

Executive Director, Amy Larson  
*alarson@cobar.org 303-824-5365*  
Deputy Executive Director & COO, Dan Sweester  
*dsweester@cobar.org 303-824-5354*  
Communications/Membership Director, Heather Folker  
*hfolker@cobar.org 303-824-5350*  
Local Bar Relations & Access to Justice, Kathleen Schoen,  
*kschoen@cobar.org 303-824-5305*  
Board of Governors, Jessica Lindzy  
*jlindzy@cobar.org 303-824-5343*

### CBA Bylaws

CBA Bylaws can be found here:  
cobar.org/Portals/COBAR/Repository/cbablyaws19.pdf?ver=2019-11-04-082759-223

### CBA Benefits

Login to cobar.org/perks to access benefit information.

### CBA Sections Best Practices

A Best Practices Handbook for managing sections:  
cobar.org/portals/cobar/repository/sections/BestPracticesPlaybook.pdf

- Nominations and elections
- Council composition
- On-boarding new members
- On-going engagement and communications
- Legislative process
- Fiduciary obligations and finances
- Micro volunteering
- Meeting protocol
- Section coordination

### CBA Board Of Governors

Orientation information can be found online: cobar.org/About-the-CBA/Governance/Board-of-Governors/Board-of-Governors-Orientation

## COLAP Colorado Lawyer Assistance Program

coloradolap.org

## Colorado Lawyers Helping Lawyers

clhl.org

## Colorado Supreme Court Office of Attorney Regulation

Helps the Colorado Supreme Court regulate the practice of law in Colorado through various programs. The office oversees attorney admissions, attorney registration, mandatory continuing legal and judicial education, attorney diversion and discipline, regulation of the unauthorized practice of law, and inventory counsel. Here are a few helpful links:

### Complaints/Discipline

For members of the public to find out about the complaint process and launch an investigation  
coloradosupremecourt.us/Complaints/File\_ComplaintAgainstAtty.asp  
303-457-5800

## Young Lawyers Division (YLD)

The YLD exists to serve law students and new lawyers. It is a great source of enthusiastic participants. The YLD puts on CLEs, hosts networking events, helps facilitate volunteer opportunities, and creates pathways to leadership positions within the Bar and our communities. The YLD is great about partnering with other groups to create some great events. Any member of the CBA who is under 37 or has been in practice for less than five years is automatically a "young lawyer." If you'd like to know more about the YLD, including how to become more involved, contact the current chair, or staff liaison Jess Ham. Consider reaching out to a young member in your bar association and asking them to serve as a YLD liaison from your local bar to communicate information both directions.  
cobar.org/For-Members/Young-Lawyers-Division

## Liaison Positions

The CBA has developed a strategic plan titled Refocus 20/20. One of the directives of the plan is to assign each member of the CBA Executive Council, District Vice Presidents and Section Leaders to act as liaison to one of the Local Bar Associations.

The assignments are listed at this link: cobar.org/About-the-CBA/Governance/CBA-Executive-Council. This liaison is an excellent resource and contact point person for connecting your local bar to the CBA.

### **Continuing Legal Education Information**

Each attorney must submit his or her own affidavit. To enter an affidavit, go to [cletrack.com/](http://cletrack.com/) and enter your Bar # and DOB. Then on the next screen: Click “enter online affidavit”, Click “seminar”, Enter course ID 7XXXXXX.

If you do not know the CLE Course ID, you can search for it in the course lists listed by year. Use the direct link below or the above link and then on the left-hand menu hover over “Continuing Legal Education” then “Accredited Courses.” [coloradosupremecourt.com/Current%20Lawyers/AccreditedCourses.asp](http://coloradosupremecourt.com/Current%20Lawyers/AccreditedCourses.asp) Then download the “Accredited Programs Listed by Date” document. Then search that document (Ctrl + F) for EPCBA courses using our sponsor name “PASBAR”. And then click “Load Affidavit.” On the next screen, enter the number of credits and click the “no” option for whether it is accredited in another state. Having problems with entering an online CLE affidavit? Email: [cleinfo@csc.state.co.us](mailto:cleinfo@csc.state.co.us) or 303-928-7771

### **Colorado Attorney Mentoring Program (CAMP)**

Pairs attorney mentors and mentees across the state. They have everything from informal, low commitment mentoring programs to year-long, 15 CLE credit programs. The link to the mentoring page can be easily inserted into a local bar website, just contact them.

Director, J. Ryann Peyton  
[coloradomentoring.org](http://coloradomentoring.org)  
303-928-7750

### **Specialty Bar Contact List**

There are a variety of specialty bar associations and they are all listed on the CBA’s website [cobar.org/Local-Bar-Associations/Specialty-and-Minority-Bar-Associations](http://cobar.org/Local-Bar-Associations/Specialty-and-Minority-Bar-Associations)

- Asian Pacific American Bar Association of Colorado
- Association of Corporate Counsel
- American Academy of Matrimonial Lawyers, Colorado Chapter
- Colorado Criminal Defense Bar
- Colorado Chapter of the Federal Bar Association
- Colorado Defense Lawyers Association
- Colorado Hispanic Bar Association
- Colorado Trial Lawyers Association
- Colorado Women’s Bar Association
- Colorado Indian Bar Association
- Colorado Lesbian Gay Bisexual Transgender Bar Association (LGBT Bar)
- Faculty of Federal Advocates
- Mother Attorneys Mentoring Association
- Sam Cary Bar Association
- South Asian Bar Association of Colorado

### **General All CBA Member Communication**

- C-brief comes out monthly
- Social media
- Website
- CBA Community
- Jobs Board
- Judicial Vacancies
- Opinions
- e-Legislative Reports/Media Summaries

### **Community**

Members can login to the CBA web site at [community.cobar.org/home](http://community.cobar.org/home) to manage email preferences, discussion lists and newsletters. Please note that members will receive section and Bar newsletters automatically based on memberships.

### **Section and Committee Listservs**

- Agricultural and Rural Law Section
- Alternative Dispute Resolution Section
- Animal Law
- Business Law Section
- Civil Rights Section
- Communications and Technology Law Section
- Construction Law Section
- Criminal Law Section
- Disability Law Section
- Elder Law Section
- Entertainment and Sports Law Section
- Environmental Law Section
- Ethics Committee
- Family Law Section
- Government Counsel Section
- Health Law Section
- Immigration Law Section
- Intellectual Property Law Section
- International Law Section
- Judicial Liaison Section
- Juvenile Law Section
- Labor and Employment Law Section
- Litigation Section
- Military and Veterans’ Affairs Section
- Modern Law Practice Initiative
- Natural Resources & Energy Law Section
- Open Forum
- Privately Held Business/Business
- Real Estate Law Section
- Solo Small Firm Practice Section
- Taxation Law Section
- Trust and Estate Section
- Water Law Section

- Workers' Compensation Section
- Young Lawyers Division

## Local Bar Associations & Structure

### Structure

There are 26 local bar associations. Six of the Local Bar Associations utilize Executive Directors who report to the individual Local Bar board. The remaining twenty Local Bar Associations utilize the board members of the Local Bar as their leadership structure.

### Local Bar Contact List

For information on the 26 local bars go to: [cobar.org/Local-Bar-Associations](http://cobar.org/Local-Bar-Associations)

- Geographical areas served
- Link to join the local bar
- Contact information for President and Executive Director
- Phone number for local bar
- Dues structure
- View members
- Local Bar Handbook

### Secretary of State Filings

Each year, your Bar Association needs to file updated information and periodic reports with the Colorado Secretary of State. It will be on the same date each year and is a short form available on the Colorado Secretary of State Website. Often a prior bar leader will receive the email reminder for the updated report or change in the entity. Many smaller volunteer run bars use the office address of the current President as the principal place of business for the bar association.

### Tax Filings

Mark deadlines that IRS documents must be filed each year to maintain your non-profit status. Your Non-Profit status may also assist in getting lower rates on renting meeting space. You will want to keep current on your filings to maintain tax-exempt status and keep a copy of your tax-exempt documentation accessible to all bar officers so that it may be referenced when needed for events.

Go to: [irs.gov/help/tools](http://irs.gov/help/tools)

### Membership Dues

Each local bar determines the dues structure for their bar. Your dues structure must be communicated to the CBA by January 1 of each year for the next year.

Contact: Heather Folker [hfolker@cobar.org](mailto:hfolker@cobar.org) The CBA provides local bars several membership tracking reports.

They are a valuable resource of information about your membership and the income you generate.

### Local Bar Roster

This report lists your current membership as of the report date. See below for a description of some of the columns.

Customercd	CBA customer number
Customeraltcd	Attorney number
Customertype	CBA customer type
Start Date	Usually the current dues term period but may differ if paid earlier or later in year
License Date2	Colorado Bar admit date
Join Date	Latest membership date
Customer Type	CBA customer type
First Join Date	First joined CBA Bar
Custom	Your local bar customer type

### Local Bar Dues Report

This report lists the dues payments received in the previous month. It arrives via email and is also sent through regular mail with the membership dues check for the month.

### Budgeting, Banking, Reserves, Card Processing

It is important to create and maintain a yearly budget for your bar association. There are several software programs that simplify the process. Determine if the budget should be approved by the Executive Committee or the entire board. Also, as the Executive Committee changes, make adjustments to checking account and debit card signature authorizations. Determine if check writing and transfers between accounts should be restricted for audit purposes.

Reserve accounts might be appropriate for your bar association to meet future obligations. You may determine that a reserve amount should be established as a goal for your bar association or you may determine that a reserve account should be created that impacts the balance sheet.

Utilizing a credit card payment process for your membership is an important consideration. Although the fees charged by the servicer will impact your profit, most members are accustomed to paying for events with a credit card for convenience. Some members may still prefer to pay by check or cash. Communicate the payment options you will offer to your membership.

## Board of Governors

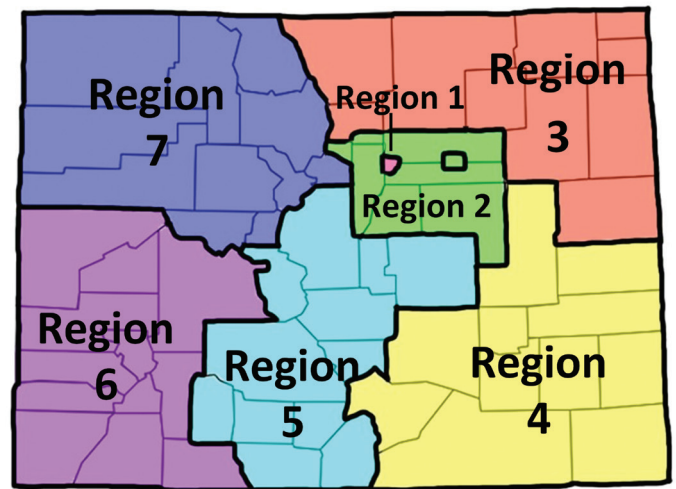
The affiliated Local Bar Associations are entitled to have representation on the Colorado Bar Associations Board of Governors. The stipulations for Local Bar representation are laid out in Article 5 of the CBA Bylaws in the Appendix. This position works as a conduit between the CBA and the Local Bars around the state. Select your representative thoughtfully as the Board of Governor representatives need to attend two meetings per year, as well as communicate regularly with the Executive Council Liaisons and the Colorado Bar Association with information to your local bar and from your local bar.

## CBA Regions

These regions dictate which Local Bars work together to make appointments for the Vice Presidents on the Executive Council for the CBA, elect Presidents on a geographically rotating basis and work with both the CBA and the ABA to provide services and information to members. It is very helpful to know which Local Bar Associations are in a region when marketing programs to increase attendance and share information with other bars. For example, you may invite a neighboring bar for a joint meeting or invite their members to a CLE presentation at your local bar.

1st Region	Denver
2nd Region	Adams-Broomfield, Arapahoe, Aurora, Douglas-Elbert, First JD
3rd Region	Boulder, Larimer, Thirteenth District, Weld County
4th Region	Pueblo, Sixteenth, Southeastern, Southern
5th Region	El Paso, Fremont/Custer, Heart of the Rockies, San Luis Valley
6th Region	Four Corners, Mesa County, Seventh JD, Southwestern,
7th Region	Continental Divide, Ninth JD, Northwestern, Pitkin County

## Map of Regions



## Bylaws

Bylaws are your governing documents and it is important that the document is clear and concise and sets out your guidelines for your organization. It is generally a good idea to have the bylaws posted on your website or otherwise available for members. Be sure to include how members maintain member status, how the membership votes, how your board will operate and meet, when and how elections will be held, and if your voting will be in person or by email or electronic means. The following policies and practices are important elements of any organization. Consider documenting them in your bylaws. An Example of Bylaws is included in the Appendix.

- Bonding
- Anti-trust policy
- Confidentiality policy
- Conflict of interest policy
- Ethics policy
- Whistleblower protection policy
- Code of conduct policy
- Directors and officer's liability insurance
- Board members removal policy
- Volunteer travel reimbursement policy
- Record retention and destruction policy

## Mission Statement

A clear and concise Mission Statement is one of the things that will be used to describe your organization. A Mission statement describes the purpose of your bar association and a Vision Statement describes the values of your bar association. They can be combined to reflect both visions. An example of a Mission and Vision Statement is shown in the Appendices

## Governing

From the American Bar Association: “Good governance makes great organizations. We have collected some of our favorite governance resources here to help your board govern more effectively.”

- Board Governance — Key Roles and Responsibilities Building Your Board
- Evaluating Programs Fiduciary Case Studies Financial Oversight Policies and Practices
- Board-Executive Director Partnership

[americanbar.org/groups/bar\\_services/resources/resourcepages/governance.html](http://americanbar.org/groups/bar_services/resources/resourcepages/governance.html)

## Officer Duties

*President* — email communications to members; schedule board meetings and arrange for meals when necessary; Lead meetings, host and speak at events.

*Vice President* — assist president with communications and bigger events.

*Secretary* — File IRS Form 990-N; take board meeting minutes; work with President to create an agenda for each meeting; email all materials to board members and upload to Google Drive or website.

*Treasurer* — Check PO Box; gather bank statements and upload to Google Drive/website. Update/reconcile QuickBooks files; deposit cash and checks, issue reimbursement checks; and present financial status at year-end meeting.

*Past President* — Pass along experiential knowledge; facilitate transition to new President; be available to answer any and all questions.

*Board of Governor’s Representative* — Represent your organization at the biannual CBA Board of Governors Meetings; provide members with summary of meetings; coordinate with CBA; connect with the Executive Council Liaison regularly; contact CBA to let them know when you have updated or changed your representative.

If your local bar or section has a representative to the Colorado Bar Board of Governors, please select an individual that can represent your entity well, communicate the information bi-directionally, and can attend the meetings. The group meets twice a year. It is further required that each year you provide the name of your BOG representative to the CBA. It is also a great idea to identify the Officers and BOG representative on your Bar emails in the signature line, and on your website. There is a special orienta-

tion video on the CBA website for new Board of Governors which EVERY NEW representative for onboarding and orientation to make your BOG rep and effective part of both organizations.

## Passing the Torch — Succession Planning

It is a CBA Best Practice to use a succession plan and term limits when it comes to leadership positions in a Local Bar Association. It is a good way to get new or younger members into leadership positions more quickly. It also keeps the organization infused with excitement and new and original ideas.

## Suggested Reading

*New Bar President* is the essential resource for any officer ascending to the role of President. The handbook outlines the President’s key roles in governance, financial oversight and communication with members and the public. The handbook is comprehensive but succinct, and is loaded with practical tips, helpful checklists and an invaluable Presidential planning guide. [americanbar.org/groups/bar\\_services/publications/nbp.html](http://americanbar.org/groups/bar_services/publications/nbp.html)

*New Bar Board Member* speaks specifically to the unique role of Bar Association board members. The handbook helps readers learn about the bar landscape, refreshes their understanding of fiduciary duty and the practices of exceptional boards, and helps them understand how every board experience is different. Use *New Bar Board Member* as a foundation for your orientation, or for any board training effort. [americanbar.org/groups/bar\\_services/publications/](http://americanbar.org/groups/bar_services/publications/)

*Bar Leader Weekly Magazine* Sign up for the Bar Leader Weekly Magazine- This weekly newsletter helps busy bar leaders stay up to date with the latest in bar association news and key issues in the legal profession. [americanbar.org/groups/bar\\_services/publications/barleaderweekly/](http://americanbar.org/groups/bar_services/publications/barleaderweekly/)

## Orientate New Bar Leaders

New Bar leaders need to be orientated on how to effectively lead your Bar Association. Create a “New Bar Leader Handbook” to orientate your new bar leaders and transfer institutional knowledge. An example is in the Appendix. Possible topics, include:

- Expectations of your Bar leaders (e.g. time commitments and officer responsibilities)
- Annual events
- Banking and financial information

- Usernames and passwords for email address and websites
- Organizational timelines identified to plan meetings in advance

### **Develop Leadership Skills**

Bar leaders are expected to build relationships among legal leaders; raise awareness regarding issues facing the legal profession; and nurture effective leadership with respect to ethical, professional, and community service issues. Just as lawyers need to engage in CLEs, Bar leaders continue to develop their leadership skills and expose themselves to new ideas. There are a variety of organizations and tools available to Bar leaders in Colorado.

**Colorado Bar Association Leadership Training (COBALT)** is an interactive leadership training program designed to teach leadership skills and learn how to address challenges faced by leaders. For more information about how to participate and scholarship opportunities go to [cobar.org/cobalt](http://cobar.org/cobalt).

**American Bar Association's Bar Leadership Institute (BLI)** is the ABA's premier Bar leadership training program held over a 3-day weekend. For more information about how to participate and scholarship opportunities go to [americanbar.org/groups/bar\\_services/events/bli.html](http://americanbar.org/groups/bar_services/events/bli.html)

### **Meeting Protocol and Communication**

#### **Meeting Protocol and Communicating with Members**

There is a little planning that must be undertaken to hold effective meetings. Most Bar Associations follow Roberts Rules of Order for Meeting procedure. Generally, the President of the Local Bar will set and lead the meeting and, in many cases, plan the meeting and location details as well. Any meeting should have an agenda that sets out the items that will be discussed at the meeting that is distributed to the attendees. Providing an agenda allows members to follow the meeting or place their comments at the appropriate discussion point. Allowing the members to view the agenda in advance on your website or in the meeting notice emails is a great method to generate interest and more discussion at meetings. An example of an agenda is included in the Appendix.

#### **Scheduling Meetings And Events**

Some entities will have more success by setting dates in advance and providing notice to the members or choosing a set repetitive date such as the 1st Tues-

day of each month. For smaller attendance events or meetings, it is often advisable to send a Doodle Poll ([doodle.com](http://doodle.com)) and pick the most requested date. Most local bars will schedule all their meetings for the upcoming year so that the information is on the website or an email to allow members to schedule and plan in advance. As a general rule, members can only attend a meeting with no scheduled conflicts, so 60 days' notice for a meeting allows attendees to plan.

Look at the calendars for local schools for school breaks, local events, and event date clearing for the major holidays of each faith as well as any large sporting events such as the World Series or Superbowl to avoid conflicts. If you have a rural community, scheduling a meeting when most of your members will be at another community event is easy to avoid with a little calendar clearing.

Take the time to identify easy meeting spaces which may include court space, offices, restaurants and keeping an active list is advisable. Each event will also need a food and beverage budget and remember that some of your members may have different dietary needs or desires, so it is good to have an option for vegetarian/gluten free/vegan.

#### **Communicate with Your Bar Association**

Bar leaders must employ effective communication techniques to deliver relevant and timely information to their members. To develop these communication techniques, consider the following:

- Create an email address for your Bar Association
- Update your member's email list annually by contacting the CBA Membership department.
- Create a website where your members can easily access upcoming events, relevant documents, and classifieds.
- Utilize email programs such as MailChimp, Constant Contact or other programs that allow easy import of the member list as well as easy email templates for meetings and events.
- Keep your Local Bar Officer and Board of Governors representative contact information current and update it on your website, in emails to the members, and to the CBA. You must contact the staff at the CBA to update your list when changes occur.

#### **Technology**

One of the fundamental challenges for rural legal practitioners is feeling disconnected from the legal



community including their Local Bar Association. Some Bar Associations serve attorneys from several counties with no central location. In the vast swaths of Colorado, Local Bar Associations can serve as social and professional connection conduits. The crux becomes how to make that connection in the first place when the practicality of being in the same room is highly inconvenient?

Luckily, technology has permeated the legal field including filing, client communication, CLEs, and related social media. The technology available to Local Bar Associations doesn't have to be the latest and greatest to be effective. Bar Associations should refrain from placing a large capital investment into physical technology and instead look toward the infrastructure that is already present or present from other sources. For example, Bar Associations can capitalize on the Colorado Judicial Branch's efforts to modernize courtrooms. Most court rooms are now being retrofitted to include projectors, large screens, public Wi-Fi, and computer presentation options. Because courtrooms are designed for public use and many judicial officers are members of the Local Bar, it is an easy marriage to use courtroom tech for Bar purposes free of charge. Additionally, aside from appealing to millennials, social media has given us a variety of ways to connect to other attorneys and communities of all types and made doing so much easier. This is the type of cloud infrastructure that Local Bars should take advantage of and is freely available or at least at low cost. YouTube channels, Facebook live posts, Periscope sessions, podcasts, webcasts, and Twitter feeds are now tools that Local Bar associations can use in connecting to groups (large and small) and to communicate ideas and events. Local Bar Associations should consider investing time and effort in technology that will close the physical distances between communities and attorneys in Colorado. Consider the applicability of a phone attendance option for meetings with large geographical spans, a zoom meeting or a freeconference.com video feed where you can see members and members can see and interact with you. All you generally need is a webcam or a laptop with a camera.

The CBA will post and promote anything to its followers as well. There is a social media posting form included in the Appendix. Just fill out the form and send it back to the address on the form and the CBA will post the information on Facebook, Twitter or any other options. By using the CBA feeds, the Local Bar Associations may get a wider reach than just using their own feeds.

## **Website**

Keep your officer, BOG representative, and other contact information on your website current. You can also easily place your meeting minutes or other announcements on the website so that people can find information if they missed an email. Some smaller bars can have a basic website hosted by the CBA to reduce costs and management issues for the local bars. Your local bar website should always have the next meeting posted, and minutes from your last meeting, as well as upcoming events, agendas.

## **Presidential Visits**

### **CBA President Visits to Local Bar Associations**

As provided by the CBA Bylaws, the CBA President visits every Local Bar Association. That means visiting all 26 local bar associations in Colorado during the President's one-year term running from July 1 through June 30.

The Local Bar visits are a highlight of each CBA President's term, providing the President with an opportunity to interact with CBA members from around the state and, most importantly, to get their feedback on the state of our profession.

The Local Bar visits are coordinated by a CBA staff member who serves as liaison with the Local Bar. That liaison will reach out to each Local Bar President or other leader to coordinate the visit. This initial contact will typically occur in the spring or early summer.

Some Presidents have a particular format in mind for the meetings while others will solicit input from the local leaders on what works best in a particular locale.

Oftentimes the visits include a lunch or dinner with the CBA President speaking about the President's plans for the coming year and a CBA staff member discussing the Association's member services and benefits.

The visit may also include a CLE presentation (the one-hour ethics credit is always well received) as well as an appearance by the Court of Appeals judge who serves as liaison for the Local Bar. And the President always welcomes the opportunity to simply chat with local attorneys about the practice of law around the state.

From a logistical standpoint:

- *Scheduling:* The CBA liaison will contact the Local Bar leader and propose dates for the visit. While the CBA works to accommodate requested dates, the Pres-

ident's schedule does not always allow for complete flexibility.

- *Local Bar responsibilities:* Once a date has been set, the Local Bar leaders will be responsible for: finding a suitable venue, ordering any food/drinks, and handling RSVP's. Some CLE presentations require A/V capabilities, so please keep in mind technical requirements when scheduling a venue. Remember to add all persons attending from the CBA to any final food/drink orders.
- *CLE:* The Local Bar leader should consider appropriate CLE topics for the Local Bar visit. The more relevant the topic, the more likely local members will attend the visit. The CBA liaison will coordinate with the President to schedule a CLE speaker once a topic has been identified. The CBA has a Speakers Bureau of ethics presenters at [cobar.org/Local-Bar-Associations/CLE-Presenters-Available-for-Local-Bars](http://cobar.org/Local-Bar-Associations/CLE-Presenters-Available-for-Local-Bars) for Local Bar leaders use for any presentation.
- *Notification to local members:* The CBA will provide an announcement of the President's visit to the Local Bar leader for review. The announcement will be emailed to local members at least twice prior to the visit and will be published in CBA social media. In addition, Local Bar leaders are encouraged to get the word out through whatever local channels of communication they have (they are free to use the CBA announcement of the visit).
- *50-year members:* As part of the visit, the CBA recognizes lawyers who have practiced law for 50 years. The CBA President will present those 50-year members with a certificate and pin. The CBA liaison will contact any 50-year members prior to a local visit to confirm their attendance. In some instances, the CBA liaison may require the assistance of the Local Bar leader with information about the 50-year member.
- *Day of visit:* The Local Bar leader is responsible for preparing and setting up the venue prior to the beginning of the meeting. The President will arrive early to meet with the Local Bar leader, and to greet arriving members. It is recommended that someone be available to assist with any technical glitches that may arise.
- *After visit:* The CBA liaison will follow up after the visit to gather feedback. The liaison may need assistance in identifying local members that are in photographs taken at the visit.

Many CBA Presidents will be open to activities with the local members such as skiing, golfing, hiking, standup

paddle boarding, or other suggested activities that might interest your members. The Local Bar Visits are a true partnership between the CBA and the Local Bar leaders and, when well-planned and executed, are a wonderful experience for both the CBA President and the Local Bar members

### **Local Bar Emails**

Local Bar emails are made easier with applications like constant contact, MailChimp, and other mass mailing templates. You can import the email addresses of your Bar members and provide information regularly, the applications allow you to schedule sending the email at future times, including reminder emails. If you need to have an RSVP form returned, it can be more manageable to have a Wufoo form or other application so you don't have difficulty finding the emails. You can create an email address for your Bar that passes from officer to officer. You can schedule the original email, and several reminder emails without going back into the application.

### **CLE and Speakers for Your Events**

If you are a CLE Provider, you can find information about how to apply for accreditation of CLE programs, which fees apply to you, and which requirements must be met before you can sponsor CLE programs in Colorado at: [coloradosupremecourt.com/PDF/CLE/CLE\\_Regulations\\_Effective\\_January\\_1\\_2019.pdf](http://coloradosupremecourt.com/PDF/CLE/CLE_Regulations_Effective_January_1_2019.pdf)

- The form **MUST BE SUBMITTED 21 BUSINESS DAYS BEFORE THE CLE** and you have to send it, with a check, via U.S. Mail. **PLAN AHEAD!!!**
- Application found here [coloradosupremecourt.com/PDF/CLE/Form1.pdf](http://coloradosupremecourt.com/PDF/CLE/Form1.pdf)
- \$50 fee for a Local Bar Association. The cost will go up significantly the closer to the program you apply.
- Must include a course outline/description, names of presenters, cost, date and location.
- They will mail or email you the affidavit once it's approved, make sure to make it available for your attendees.
- An example of the form is in the Appendix.
- Create an evaluation form to send along with your accreditation request and distribute it to all attendees at the CLE. Retain the forms for 2 years or as stated in the Colorado Supreme Court requirements. You can also compile the evaluations and present the findings to the presenter after the event. An example of an Evaluation is shown in the Appendices.

## Bar Functions and Networking Events

Networking is an important aspect of every lawyer's career and every event, meeting or CLE can be turned into a great networking opportunity. However, in order for an event to be a successful networking opportunity, it is essential that the event is attractive to a diverse group of attorneys in your area (for example, young and seasoned attorneys). The more diverse the participants, the more likely new relationships will be created and the more likely your event will be a success.

As you plan your event, you should ask yourself/team the following questions:

- Why are you organizing your event?
- Are you trying to target a particular interest? Age group? Practice Area?
- Do you want to engage participants/attendees from the community?
- Who is funding this event? Do you need formal approval from your board?
- What is your budget for this event?
- When and where the event should take place?
- What is your expected outcome from the event? (e.g. social, CLE, focus on attorney work-life balance etc.)

## Types of Events

While happy hours and lunches are the most common events, here are some unique alternatives:

- Bar and Bench — Donut & Coffee Networking Event
- State of the City meeting with local politicians
- COLAP Presentations
- Community Service Events — Habitat for Humanity, Tree Planting, Trail Renewal
- Buy a block of tickets for membership and their families to attend a sporting event or concert
- Create an adult sport league (e.g. bowling, softball, volleyball, etc.)
- Picnic/BBQ at a local park
- Book a private party with "Painting with a Twist"
- Sport "watch party" (e.g. Super Bowl, Olympics, World Cup, Stanley Cup, etc.)
- Trivia Parties

## Planning Your Event

Each venue will be distinctive and most will have a planning coordinator who can help you craft a menu that fits your budget. Here is a quick checklist of things to consider while you are working with your venue event planner. Consider the Date, the guest count, budget, venue cancellation policy, deposit required, do you need to provide tax exempt documentation, will you need audio visual

equipment, is there a cost to set up or breakdown, food total, liquor total, when will it need to be paid, are there any considerations for members physical access to the venue? There is an event planning checklist provided in the Appendix.

## To Charge, or Not To Charge?

Some believe that a free event will result in better attendance. While this may be true for certain events, charging a fee (even \$5) creates a perception that you are providing value for the participant. Charging a fee also provides a stronger incentive for the participant to actually attend the event. If a participant pays a fee, then they are more invested and are less likely to be a "no-show." Also, we are all working on a tight budget so you may want to charge a fee so that you can offset the cost of the event. If you want to collect fees prior to the event, there are many applications that will allow you to receive payment via digital means.

## Marketing Your Event — The Role of Social Media

Word-of-mouth and email blasts are helpful, but the best way to reach out to your membership is to promote your event through social media. This is particularly true for the generation X and millennial attorneys. The five most popular social media sites are:

- Facebook
- Twitter
- Instagram
- LinkedIn
- YouTube

Each Bar Association should have a page/profile for each of the above social media sites and someone on the leadership team (i.e. the Executive Director, President/Chair, Secretary, etc.) should have administrator rights to each page/profile. You are also welcome to use the CBA feeds as well.

If you are looking to provide outreach through various social media sites, but don't have a lot of time, then look into Hootsuite. Hootsuite offers a free plan that allows you to manage up to 3 social media profiles in one place. It also allows you to track your (or your Bar Association's) followers and it allows you to schedule messages to be sent at a later date. For information, go to: [www.hootsuite.com](http://www.hootsuite.com).

## Pro Bono Work

Pro Bono service is a way to give back to a community and to provide access to justice to individuals who would not otherwise be able to afford legal assistance. Much of any Bar

Associations time and budget is spent tackling Access to Justice issues.

## **Rules and Guidelines for Pro Bono**

### **Representation Ethical Guidelines**

Section 6 of the Colorado Rules of Professional Conduct describes the professional responsibilities that attorneys have to the public. Rule 6.1 recommends attorneys provide fifty hours per year to persons of limited means and charitable organizations. While the rule provides clear guidelines on the provision of pro bono services, comment 11 indicates this professional responsibility is not intended to be enforced via disciplinary proceedings. Therefore, the fifty-hour rule is merely a guideline and not a hard and fast rule.

### **Supreme Court Recognition for Meeting Pro Bono Standards**

The Colorado Supreme Court recognizes attorneys, firms, in-house counsel, and government groups that reach the fifty-hour annual goal. To receive recognition, you or your firm or organization must self-report to Justice William Hood III.

### **How To Encourage Participation**

Not only do the Rules of Professional Conduct encourage assistance to underserved individuals, but also aiding those in need is often cited as a primary reason many of us went to law school in the first place. Although we strive to help those unable to afford our services, the reality is that many of us simply lack the time to make the connections to find the underserved populations. To that end, it would be helpful to members of the Local Bar Associations for the Bar Association to coordinate the provision of services to these populations.

### **Coordination of Opportunities**

Many communities have at least one organization dedicated to providing pro bono services and triaging clients to willing firms in the area. The Bar Association could fairly simply maintain up-to-date contact information for these organizations and coordinate outreach to match attorneys to these organizations.

Attorneys then would use these resources to find pro bono clients. It is worth mentioning that Rule 6.1 is not satisfied if the attorney later writes off the client's bill or the client just never pays. Rather, the attorney must intend the pro bono arrangement from the beginning of the client relationship.

### **Local Recognition**

The Supreme Court recognizes firms and attorneys who reach the fifty-hour goal and publishes the names of the firms, solo

practitioners, organizations, etc., on its website. The Local Bar Association could monitor this list and provide additional recognition in the form of a certificate, a thank you, or some other way to acknowledge attorneys' contributions to providing justice to the underserved in their communities.

### **Ask-A-Lawyer Days**

One way to organize services to underserved populations and to provide a ready opportunity for attorneys to meet their goals is to organize an Ask-a-Lawyer day, during which clients can consult with attorneys to discuss their matters without engaging an attorney in full representation. One caveat however is to take necessary precautions to limit the attorney-client relationship and explain to clients the scope of the consultation prior to beginning. This can be accomplished with a brief waiver or engagement agreement type document prepared in advance and available to clients at the door.

### **Planning and Advertising**

Keep in mind the number of attorneys participating, amount of space needed, whether refreshments will be served, etc. Also, begin planning the event with enough lead time for the attorneys to fit it into their schedules if they are planning on participating.

Because the event is aimed at a particular population, it is important for the advertising efforts actually reach that population. Therefore, efforts must be directed at locations where the underserved individuals will actually be. This will vary from community to community.

### **Legal Services Corporation**

Many organizations that provide legal aid are funded by the Legal Services Corporation. This is a non-profit corporation organized by the federal government. LSC provides services primarily for victims of domestic violence, veterans, elders, and other vulnerable populations. LSC has seen its funding reduced, however, which will significantly impact legal aid services in Colorado. Colorado Legal Services relies heavily on the LSC for its annual budget. While LSC provides funding for many legal aid services around the country, it does have its limitations, simply due to the fact that the federal government runs it. With the reduction in funding, however, it is more important than ever for attorneys to meet the fifty-hour goal.

Please visit [lsc.gov](http://lsc.gov) for more information on the Legal Services Corporation.

### **Other Types of Volunteer Opportunities**

While pro bono service is a professional responsibility, attorneys can get involved in their communities in many different

ways and through other activities. Each community will vary with the types of opportunities that are available, but some ideas are:

- Mock trial
- Debate teams

- Mentoring — HS students, college students, law students, young lawyers (either new to the profession, the geographical area, or the area of law)
- Non-legal volunteering as networking opportunities

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# EXHIBIT A – NEW BOARD MEMBER HANDBOOK EXAMPLE

## Mission

The 9th Judicial District Bar Association supports its members as a central resource for information, education, and best practices, and fosters a modern legal community through ethics, service, and collegiality.

## Commitment

Be prepared to attend monthly board meetings, but meetings may only be held quarterly.

We will have a Yi day strategic planning session, usually in July or August.

Every member is expected to facilitate at least one professional development event (e.g. CLE), one networking event (e.g. happy hour), and one community development event (e.g. fundraiser).

**Secretary** — File IRS Form 990-N; Keep board meeting minutes; work with president to create an agenda for each meeting; email all materials to board members and upload to Google Drive.

**Treasurer** — Check PO box; Gather bank statements and upload to Google Drive. update/reconcile QuickBooks file; issue reimbursement checks; and present financial status at year-end meeting.

**Vice President** — assist president with communications, bigger event.

**President** — email communications to members; schedule board meetings and arrange for meals when necessary; host and speak at events.

- Note: Easiest way to schedule board meeting is using Doodle Poll to find out what dates work for 5-8 busy attorneys.

**Past President** — Pass along experiential knowledge; facilitate transition to new president; be available to answer any and all questions

**Board of Governor 's Representative** — Represent 9 JD Bar and biannual CBA Board of Governors Meetings; provide members with summary of meetings; coordinate with CBA;

## Events

Typical annual events

- CBA President 's visit (January)
- Women of the Ninth networking event (September)
- Quarterly law firm-hosted happy hours.

Best venues

- Garco Courthouse — Free, most common, easy venue for meetings and CLEs Contact Court Clerk Jim Bradford to reserve jury room 402. [andrew.streeb@judicial.state.co.us](mailto:andrew.streeb@judicial.state.co.us) and [james.bradford@judicial.state.co.us](mailto:james.bradford@judicial.state.co.us). Projector, screen, WiFi available. Can bring food in as long as you clean up.
- Rivers — more expensive but very convenient, good setting for networking or receptions. Contact Anita, general manager, at [rivers@rof.net](mailto:rivers@rof.net). Can order from banquet menu or appetizer menu depending on group size. Pay before you leave the event.
- Hotel Denver/Brewpub — the hotel loft is a great location for larger gathering, especially holiday party. Brewpub caters, no other food/beverage allowed. Contact Corrie Murray, [corrie@glenwoodcanyonbrewpub.com](mailto:corrie@glenwoodcanyonbrewpub.com). \$500 deposit required.

## CLE Accreditation

- MUST BE SUBMITTED 21 DAYS BEFORE THE CLE and you have to send it, with a check, via U.S. Mail. PLAN AHEAD!!!
- Application found here: [coloradosupremecourt.com/PDF/CLE/Form1.pdf](http://coloradosupremecourt.com/PDF/CLE/Form1.pdf)
- \$25 fee since we are a local bar association.
- Must include proposed agenda (can be super basic) and course outline/description, all names of presenters, and materials
- They will email you the affidavit once it's approved

### **Catering**

- Jimmy John's — good for lunch events at the courthouse. They will deliver.
- Slope & Hatch — must pick up, but good quality and cheap.

### **P.O. Box**

P.O. Box#

Treasurer keeps key on hand and checks at least monthly. Secretary keeps backup key. Must renew each year.

### **Banking/Financial**

US Bank Account #

Statements sent to PO Box — Treasurer checks

President, Vice President, and Treasurer have debit cards, access. Must go to bank together at beginning of each year to sign up the treasurer, take President off.

Treasurer should input annual budget into QuickBooks, along with all bank statement transactions and reconcile bank account in QuickBooks.

### **Communication with Board**

Mostly group emails

Google Drive account — all members should be provided access to all records, which includes bank statements, membership lists, etc. Someone with access will need to share the documents with new members.

### **Communication with Members**

9JDBA Gmail account

- user name:
- password:
- Entire member contact list is saved in a draft email (look in "drafts"), labeled "master email list." This needs to be updated when members notify us of a change of address or if emails bounce back from a certain address.

### **Website**

9jdba.com

Operated through Squarespace

- Username:
- Password:
- Events page should be updated regularly
- Delete past events
- Add new events
- Brie Carmer hired to work on this, Facebook page, logo. \$35/hour.
- Briecarmer33@gmail.com

### **Non-Profit IRS Registration**

EVERY YEAR before May 1, the Secretary must file a Form 990-N with the IRS to preserve our tax-exempt non-profit status.

Credentials:

- Username:
- Password:

# EXHIBIT B – STRATEGY WORKSHEET

## Stewardship & Strategy Worksheet – Your Term in Context

Since significant progress on an important issue rarely happens in twelve months, it’s important to work closely with the individuals who come before you and after you in the leadership chairs. Otherwise, Bars can be susceptible to a kind of “organizational whiplash” when priorities shift from year to year.

Strategic plans can help to temper these shifts. If your bar does not have a strategic plan, it should consider developing one. Bars without strategic plans also can work to cultivate continuity from year to year. Institutionalize regular conversations among the officers and executive director about the bar’s most pressing priorities.

## The Bar’s Niche

With many organizations in the marketplace competing for lawyers’ time and attention, it’s important for each organization to focus on the things it does best. Good strategy is most frequently an extension of an existing strength.

What can our bar uniquely do (or what role can it uniquely play) that no organization can?

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What can our bar do (or what role can it play) *better* than any other organization, even if it’s not a unique role?

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What is our bar doing that other organizations do better than us? Is there a compelling reason to continue to do these things?

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### **Organizational Priorities**

What three things must we address in the next 1–2 years in order for the bar to continue to be successful?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### **Medium-term priorities and considerations**

What five things must we address in the next 3–6 years in order for the bar to continue to be successful?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### **Environmental Changes and Other Opportunities**

Are there changes or emerging opportunities that we need to take advantage of or plan for? For example:

- Bar anniversaries or milestones
- Legal community or general community milestones
- Transitions in leadership among important institutional partners (courts, legal service providers, law schools)
- Changes in circumstances among important institutional partners (legal services providers, community partners, sponsors)
- New or changing economic opportunities for members
- New or changing economic opportunities in the community

In the next 1–2 years: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

In the next 3–6 years: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

In the next 7–10 years: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

# Bylaws of Continental Divide Bar Association A Nonprofit Corporation

## ARTICLE I

### NAME AND OFFICES

*Section 1.1 NAME.* The name of the association is The Continental Divide Bar Association (the “CDBA”).

*Section 1.2 PRINCIPAL OFFICE.* The principal office of the corporation in the State of Colorado shall be the office of the acting CDBA President. The corporation, hereinafter referred to as the “corporation” or “association” may have such other offices, either within or outside of the state of Colorado, as the members may designate, or as the business of the corporation may require from time to time.

*Section 1.3 REGISTERED OFFICE.* The registered office of the corporation, required by the Colorado Nonprofit Corporation Act to be maintained in the State of Colorado, may be, but need not be, identical with the principal office in the State of Colorado, and the address of the registered office may be changed from time to time by the members.

## ARTICLE II

### MEMBERS

*Section 2.1 CLASSES OF MEMBERSHIP.* There shall be the following classes of CDBA membership:

- a. *Active CDBA Members.* An active CDBA member is any lawyer who is licensed to practice law in Colorado. Each active CDBA member shall enjoy all of the rights and privileges of CDBA membership including the right to vote and to hold office.
- b. *Associate CDBA Members.* An associate CDBA member is a non-lawyer whose primary occupation is directly involved in assisting attorneys on a regular basis in the delivery of legal services. Associate CDBA membership shall be limited to paralegals/legal assistants, law office administrators, legal secretaries, law librarians, legal services personnel and court personnel who are residents of Colorado. Each associate CDBA member must have a CBA member, who is a lawyer, sponsor for the annual renewal of associate CDBA membership and who certifies that the non-lawyer meets the qualification stated in the first sentence of this provision. Each associate CDBA shall enjoy all of the rights and privileges of CDBA membership, except the right to vote or hold office.
- c. *Retired CDBA Members.* A retired CDBA member is a lawyer (1) who has attained the age of 65 years, (2) who is not actively engaged full-time in the practice of law, and (3) who, when last licensed as a lawyer, was in good standing as such and was not thereafter suspended or disbarred. Each retired CDBA member shall enjoy all of the rights and privileges of CDBA membership, including the right to vote, but not the right to hold office, and shall pay such CDBA dues as may be fixed by the members.
- d. *Student CDBA Members.* A student CDBA member is any student of an accredited law school. Each student CDBA member shall enjoy such of the rights and privileges of active CDBA members as may be specified by the members, but not the right to hold office or to vote.

*Section 2.2 RECORD OF CDBA MEMBERS; ADMISSION; ADDRESS FOR NOTICES.*

- a. *Record of CDBA Members.* The Secretary of the association shall maintain a record of persons who have applied for CDBA membership, are qualified to be CDBA members, and have paid the dues then required for CDBA membership, which record shall be categorized by CDBA membership classification. The record shall include the most recent address, including email address, if any, provided by each CDBA member to the Colorado Bar Association or to the Secretary for sending notices to the CDBA member. It shall be the sole responsibility of the member to insure that the Colorado Bar Association or the Secretary has a current email address for the member.

- b. *Admission to CDBA Membership.* Each person who is identified on the record maintained pursuant to Section 2.2(a) shall be deemed to be admitted to CDBA membership in the respective category, subject to suspension, expulsion, or termination as provided by these Bylaws.
- c. *Notices to CDBA Member.* Because of the added expense of regular mail and the geographical diversity of the CDBA membership, email shall be the preferred method for the CDBA to provide notice to members. Notice provided by sending an email to the email address on file with the CDBA Secretary shall be deemed to have been given upon transmission. Without limiting the effectiveness of notice given in any other manner that may be provided in these Bylaws, notice given in a writing deposited with sufficient postage in the United States post, addressed to a CDBA member at the address stated on the record maintained pursuant to Section 2.2(a) shall also be deemed to have been given to that CDBA member upon such deposit.

### *Section 2.3 CDBA DUES.*

- a. *Fixing Dues.* Subject to the provisions of Section 2.,1 the members shall have the power (1) to fix the amount of dues paid by CDBA members;
- b. *Waiver of Dues.* The members may waive the dues of any CDBA member.

### *Section 2.4 TERMINATION OR SUSPENSION OF CDBA MEMBERSHIP UPON DISBARMENT OR SUSPENSION.*

- a. *Termination of CDBA Membership.* The CDBA membership of a CDBA member shall automatically terminate, without right of refund of CDBA dues paid, upon the CDBA member's disbarment or suspension for more than 12 months from the practice of law in Colorado or before the United States Supreme Court or the federal courts of the District of Colorado. A person whose CDBA membership has been terminated by reason of such disbarment or suspension may be reinstated to CDBA membership only if and when (1) the person has been reinstated to practice in all courts from which such person was disbarred or suspended, (2) the person is otherwise eligible for CDBA membership, and (3) the person is admitted and enrolled pursuant to Section 2.2.
- b. *Suspension of CDBA Membership.* The CDBA membership of a CDBA member who has been suspended from the practice of law in Colorado, or before the United States Supreme Court or the federal courts of the District of Colorado for a period of 12 months or less shall continue during the suspension, but, during the suspension, the CDBA member shall relinquish all privileges of holding office and voting, without a right of refund of CDBA dues paid.

## *ACTION BY MEMBERS*

### *Section 2.5 MEETINGS OF MEMBERS*

- a. *Call.* A meeting of the CDBA members shall be called by the President.
- b. *Notice.* The President shall give notice of the meeting. The date of the meeting shall be no fewer than 15 days after the date the notice is given. The notice shall be given to each person who is a CDBA member at the close of business on the day preceding the date the notice is given, whether or not the member is entitled to vote at the meeting. The notice shall state the date, time and place of the meeting and a description of the purpose or purposes for which the meeting is called and shall be given by mail or by such other means as the President may determine.
- c. *Quorum.* At the meeting, a quorum for the transaction of business shall be five percent of all of the CDBA members who are entitled to vote at the meeting.
- d. *Presiding Officer.* The President, or, in his or her absence, the Vice President, shall be presiding officer at the meeting.

*Section 2.6 Action of Members without a Meeting.* Any action that may be taken at a meeting of the CDBA members may be taken without a meeting if a majority of the CDBA members entitled to vote consent to such action in writing.

*Section 2.7 REGULAR MEETINGS.* Regular meetings of the members, for any purpose or purposes, may be called by the President and shall be called by the President at the request of ten members.

*Section 2.8 MEETING OF ALL MEMBERS.* If all of the members who are entitled to vote shall meet at any time and place, either within or outside the State of Colorado, and consent to the holding of a meeting at such time and place, such meeting shall be valid without call or notice, and at such meeting any corporate action may be taken.

*Section 2.9 QUORUM.* Five percent of the members present and entitled to vote shall constitute a quorum at any meeting of members except as otherwise provided by the Colorado Nonprofit Corporation Code and the Articles of Incorporation. In the absence of a quorum at any such meeting, a majority of the votes that the members present are entitled to cast, being cast for adjournment, the meeting may be adjourned from time to time for a period not to exceed sixty days without further notice. At such adjourned meeting at which a quorum shall be present or represented, any business may be transacted which might have been transacted at the meeting as originally noticed. The members present at a duly organized meeting may continue to transact business until adjournment, notwithstanding the withdrawal during such meeting of that number of members entitled to cast a majority of the votes whose absence would cause there to be less than a quorum.

*Section 2.10 MANNER OF ACTING.* If a quorum is present, the affirmative vote of the majority of the votes represented at the meeting and entitled to be voted on the subject matter shall be the act of the members, unless the vote of a greater proportion or number of votes is otherwise required by statute or by the Articles of Incorporation or these Bylaws.

- a. All meetings of the members shall be conducted in accordance with the procedural rules set forth in the most recent edition of Roberts' Rules of Order.

*Section 2.11 VOTING.* Unless otherwise provided by these Bylaws or the Articles of Incorporation, each member shall be entitled to one vote upon each matter submitted to a vote at a meeting of the members.

*Section 2.12 VOTING BY BALLOT.* Voting on any question or in any election may be by voice vote unless the presiding officer shall order or any member shall demand that voting be by ballot.

*Section 2.13 ELECTRONIC VOTING.* In addition to other methods of voting authorized by these Bylaws or by law, voting may be conducted electronically when a majority of the the Executive Committee so determines. Any electronic voting shall be conducted pursuant to written procedures adopted by a majority of the Executive Committee . As circumstances require, a majority of the Executive Committee may amend the electronic voting procedures from time to time. The Secretary shall maintain a copy of the written procedures in the corporate records, which shall be provided to members upon request. Posting of the procedures on the CDBA website shall be deemed to constitute adequate notice of the procedures to CDBA members.

- a. Electronic voting shall include, but not necessarily be limited to, voting through the CDBA website, email voting, or any other method for which technology is available that would facilitate reasonably accurate and readily accessible voting for the members.
- b. Members shall be given not fewer than 15 days notice of any matter upon which an electronic vote is taken. Notice to members may be by mail, email or any other method authorized by the written procedures adopted by the Executive Committee. A quorum for purposes of electronic voting shall be a response from five percent of all of the CDBA members who are entitled to vote on the matter.
- c. When voting is conducted electronically, every member shall have the right to communicate with other members regarding the issue to be decided. Any member may contact the CDBA President for guidance in this regard. When appropriate, the President may act to facilitate efforts amongst members to communicate regarding issues to be put to a vote.

### ARTICLE III

*Section 3.1 PRESUMPTION OF ASSENT.* A member of the corporation who is present at a meeting of the members at which action on any corporate matter is taken shall be presumed to have assented to the action taken unless his or her dissent shall be entered in the minutes of the meeting or unless he or she shall file his or her written dissent to such action with the person acting as the Secretary of the meeting before the adjournment thereof or shall forward such dissent by registered mail to the

Secretary of the corporation immediately after the adjournment of the meeting. Such right to dissent shall not apply to a member who voted in favor of such action.

## ARTICLE IV

### OFFICERS

*Section 4.1 NUMBER.* The officers of the corporation shall be President, Vice President, Secretary and Treasurer. Such other officers and assistant officers as may be deemed necessary may be elected by the members or appointed by the President. Any two or more offices may be held by the same person, except the offices of President and Secretary.

*Section 4.2 ELECTION AND TERM OF OFFICE.* The officers of the corporation shall be elected at the first meeting of the members of the CDBA in even numbered years and shall serve for a term of two years, or until their successors have been elected and qualified. If the elections of officers are not held at such meeting, such elections shall be held as soon thereafter as practicable.

*Section 4.4 VACANCIES.* A vacancy in any office because of death, resignation, removal, disqualification or otherwise, may be filled by the members for the unexpired portion of the term.

*Section 4.5 PRESIDENT.* The President shall be the chief executive officer of the association and, subject to the control of the members, shall in general supervise and control all of the business and affairs of the corporation. He or she shall, when present, preside at all meetings of the members. He or she may sign, with the Secretary or any other proper officer of the corporation thereunto authorized by the members, deeds, mortgages, bonds, contracts, or other instruments which the members have authorized to be executed, except in cases where the signing and execution thereof shall be expressly delegated by the members or by these Bylaws to some other officer or agent of the corporation, or shall be required by law to be otherwise signed or executed; and in general shall perform all duties incident to the office of President and such other duties as may be prescribed by the members from time to time.

*Section 4.6 VICE PRESIDENT.* The Vice President shall, in the absence of the President or in the event of his or her death, inability or refusal to act, perform all duties of the President, and when so acting, shall have all the powers of and be subject to all the restrictions upon the President. Any Vice President shall perform such other duties as from time to time may be assigned to him or her by the President or by the members.

*Section 4.7 SECRETARY.* The Secretary shall: (a) keep the minutes of the proceedings of the members in one or more books provided for that purpose including a record of any electronic voting; (b) see that all notices are duly given in accordance with the provisions of these Bylaws or as required by law; (c) be custodian of the association records; (d) keep a register of the post office and electronic address of each member which shall be furnished to the Secretary by such member; and (e) in general perform all duties incident to the office of Secretary and such other duties as from time to time may be assigned to him or her by the President or by the members.

*Section 4.8 TREASURER.* The Treasurer shall: (a) have charge and custody of and be responsible for all funds and securities of the CDBA; (b) receive and give receipts for moneys due and payable to the CDBA from any source whatsoever and deposit all such moneys in the name of the association in such banks, trust companies or other depositories as shall be selected in accordance with the provisions of Article V of these Bylaws; and (c) in general perform all of the duties incident to the office of Treasurer and such other duties as from time to time may be assigned to him or her by the President or by the members.

## ARTICLE V

### CONTRACTS, LOANS, CHECKS AND DEPOSITS

*Section 5.1 CONTRACTS.* The members may authorize any officer or officer's agent or agents to enter into any contract or execute and deliver an instrument in the name of and on behalf of the corporation and such authority may be general or confined to specific instances.

*Section 5.2 LOANS.* No loans shall be contracted on behalf of the corporation and no evidences of indebtedness shall be issued in its name unless authorized by a resolution of the members. Such authority may be general or confined to specific instances.

*Section 5.3 CHECKS, DRAFTS, ETC.* All checks, drafts or other orders for the payment of money, notes or other evidences of indebtedness issued in the name of the corporation shall be signed by such officer or officers, agent or agents of the corporation and in such manner as shall from time to time be determined by resolution of the members.

*Section 5.4 DEPOSITS.* All funds of the corporation not otherwise employed shall be deposited from time to time to the credit of the corporation in such banks, trust companies or other depositories as the members may select.

*Section 5.5 GIFTS.* The members may accept on behalf of the corporation any contribution, gift, bequest or devise for the general purposes of or for any special purposes of the corporation.

## ARTICLE VI

### NONDISCRIMINATION

The officers, director, members, committee members, employees and persons served by this corporation shall be selected entirely on a nondiscriminatory basis with respect to age, sex, race, religion, national origin and sexual orientation.

## ARTICLE VII

### BOOKS AND RECORDS

The corporation shall keep correct and complete books and records of account and shall also keep minutes of the proceedings of the members and committees having any of the authority of the members.

## ARTICLE VIII

### WAIVER OF NOTICE

Whenever any notice is required to be given under the provisions of these Bylaws or under the provisions of the Articles of Incorporation or under the provisions of the Colorado Nonprofit Corporation Act, or otherwise, a waiver thereof in writing, signed by the person or persons entitled to such notice, whether before or after the event or other circumstances requiring such notice, shall be deemed equivalent to the giving of such notice.

Failure of a member to provide the Secretary with the member's current email address constitutes a waiver of notice under these Bylaws.

## ARTICLE IX

### AMENDMENTS

These Bylaws may be altered, amended or repealed and new Bylaws may be adopted by a majority of the members present at any meeting of the members at which a quorum is present.

## ARTICLE X

### EXECUTIVE COMMITTEE

*Section 12.1 APPOINTMENT.* The officers of the corporation shall constitute an Executive Committee. The designation of such Committee and the delegation thereto of authority shall not operate to relieve the members of any responsibility imposed by law.

*Section 12.2 AUTHORITY.* The Executive Committee, when the members are not in session, shall have and may exercise all of the authority of the members except to the extent, if any, that such authority shall be limited by the resolution appointing the Executive Committee and except also that the Executive Committee shall not have the authority of the members in reference to amending the

Articles of Incorporation, adopting a plan of merger or consolidation, recommending to the members the sale, lease or other disposition of all or substantially all of the property and assets of the corporation otherwise than in the usual and regular course of its business, recommending to the members a voluntary dissolution of the corporation or a revocation thereof, or amending the Bylaws of the corporation.

*Section 12.3 TENURE AND QUALIFICATIONS.* Each member of the Executive Committee shall hold office until the next regular annual meeting of the members following his or her designation and until his or her successor is designated as a member of the Executive Committee and is elected and qualified.

*Section 12.4 MEETINGS.* Regular meetings of the Executive Committee may be held without notice at such time and places as the Executive Committee may fix from time to time by resolution. Special meetings of the Executive Committee may be called by any member thereof upon not less than one day's notice stating the place, date and hour of the meeting, which may be written or oral, and if mailed, shall be deemed to be delivered when deposited in the United States mail addressed to the member of the Executive Committee at his or her business address, and, if emailed, notice shall be deemed to be delivered upon sending an email to the email address on file with the CDBA Secretary. Any member of the Executive Committee may waive notice of any meeting and no notice of any meeting need be given to any member thereof who attends in person. The notice of a meeting of the Executive Committee need not state the business proposed to be transacted at the meeting.

*Section 12.5 QUORUM.* A majority of the members of the Executive Committee shall constitute a quorum for the transaction of business at any meeting thereof, and action of the Executive Committee must be authorized by the affirmative vote of a majority of the members present at a meeting at which a quorum is present.

*Section 12.6 INFORMAL ACTION BY EXECUTIVE COMMITTEE.* Any action required or permitted to be taken by the Executive Committee at a meeting may be taken without a meeting if a consent in writing setting forth the action so taken shall be signed by all of the members of the Executive Committee entitled to vote with respect to the subject matter thereof. An email from a member of the Executive Committee shall constitute signed written consent.

*Section 12.7 VACANCIES.* Any vacancy in the Executive Committee may be filled by a resolution adopted by a majority of the full membership.

*Section 12.8 RESIGNATIONS AND REMOVAL.* Any member of the Executive Committee may be removed at any time with or without cause by resolution adopted by a majority of the full membership. Any member of the Executive Committee may resign from the Executive Committee at any time by giving written notice to the President or Secretary of the corporation, and unless otherwise specified therein, the acceptance of such resignation shall not be necessary to make it effective.

*Section 12.9 PROCEDURE.* The Executive Committee shall elect a presiding officer from its members and may fix its own rules of procedure which shall not be inconsistent with these Bylaws. It shall keep regular minutes of its proceedings and report the same to the members for their information at the meeting thereof held next after the proceedings shall have been taken.

*Section 12.10 OTHER COMMITTEES.* Other committees not having and exercising the authority of the members in the management of the corporation may be appointed in such manner as may be designated by a resolution adopted by a majority of the members present at a meeting at which a quorum is present. Except as otherwise provided in such resolution, members of each such committee shall be members of the corporation and the President of the corporation shall appoint the members thereof. Any member thereof may be removed by the person or persons authorized to appoint such member whenever in their judgment the best interests of the corporation shall be served by such removal.

#### CERTIFICATE

I hereby certify that the foregoing Bylaws, consisting of nine pages, constitute the Bylaws of the Continental Divide Bar Association, adopted by the members of the corporation as of June 24th, 2009.

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Secretary



# AGENDA — YOUR BAR ASSOCIATION NAME — WEBSITE

November 12, 2018, CITY, Colorado  
VENUE LOCATION and Address Agenda Items

- I. Call to Order and Welcome of Guests
- II. Review and Approval of Meeting Minutes from Prior meeting - Reminder to bar members that all meeting minutes are posted at the website address a couple weeks after each meeting for your review.
- III. Court Administrator Comments
- IV. Access to Justice Committee, Law day committee, or any other committees or task forces that can report on progress to the members
  - a. Members of the the ATJ committee ( name your committee members here so members can reach out to them ) met on November 6 with to discuss the needs of our litigants.
  - b. Modest means Attorney List
  - c. Mediator list
  - d. Law day coordinator and contact information
- V. Treasurer's Report
  - a. Quarterly Financial Report
- VI. Old Business
  - a. List any items that you have been working on since the last meeting, it could be legal aid donations, community service projects, networking opportunities
- VII. New Business:
  - a. News in the local bar
  - b. STUDENT MEMBERS — We now accept Student members, so encourage your associates. We would also like to get a committee to do outreach to the schools. We would like to get a few people to do some informal presentations and meetings at DU and CU
  - c. Volunteer — All 2018 dates have been posted so please sign up for:
    - i. Mediation in County Small Claims Court
    - ii. County Legal Advice Clinic
    - iii. SKYPE CLINIC — home or office. The litigants will come to a location manned by legal aid staff and you can continue to work in between the clients that show up for the clinic. Where to sign up.
    - iv. HABITAT FOR HUMANITY
  - d. Legal Aid Donation
    - i. Will the bar donate to Legal aid in the form of money, equipment, member time?
    - ii. Bench/bar events upcoming- schedule meetings where the Bench and the local bar can regularly interact or address certain topics.
  - e. CBA Board of Governors Report
    - i. The last meeting was \_\_\_\_\_. Your BOG representatives are: \_\_\_\_\_, \_\_\_\_\_. Use this opportunity to communicate between the CBA, Board of Governors, and your local bar.
  - f. Pro Bono Commitment- Identify the deadline to email Justice to notify that you will be participating in the Pro Bono Commitment is or that you have achieved your goal of 50 hours.
  - g. Mentoring/Professionalism/Lunch with Judge
    - i. The following dates are available for lunch with the following judges:
    - ii. Ryann Peyton — CAMP presentation for mentoring matches -

- h. Probation Presentation
  - i. Interstate Compact — how it works for your criminal clients presented by \_\_\_\_\_
  - j. UPCOMING EVENTS
    - i. Retirement party for judge on \_\_\_\_\_ at \_\_\_\_\_
    - ii. Board Elections will be held at the next meeting
    - iii. Next meeting to the members -date provided
    - iv. Ski Day/golf day with YLD
    - v. Holiday party, coffee socials, etc?
    - vi. Lunch with a judge
    - vii. Coffee dates
  - k. Miscellaneous New Business
  - l. President news
  - m. CBA NEWS
  - n. CLE that the members would be interested in father input

- VIII. Judge's News
  - a. Judge Comments

- IX. Adjourn

# SOCIAL MEDIA POSTING FORM

1. Type of Post

- General post
- Event
- Other

2. Dates to Post

Start: \_\_\_\_\_

End: \_\_\_\_\_

3. Content

a. Headline: \_\_\_\_\_

b. Text (2-3 sentences)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

c. Link: \_\_\_\_\_

4. Photo/images

Email completed form to Shelby Knafel at [sknafel@cobar.org](mailto:sknafel@cobar.org).

## CLE Planning Guide

**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 and 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 and 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 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:** Create an evaluation form to handout to determine the popularity and relevance of the event. An example of an evaluation form can be found in the Appendices. 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.

## Event Planning Checklist

<b>Date of Event</b>	
<b>Estimate Guest Count</b>	
<b>Budget for Event</b>	
<b>Venue Cancellation Policy</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Deposit Required</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Deposit Due Date</b>	
<b>A/V Needed?</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Cost of Set-up</b>	
<b>Service Fee Included</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Food Total</b>	
<b>Liquor Total (if not cash bar)</b>	
<b>Tax Rate</b>	
<b>Total Due</b>	
<b>Total Due Date</b>	

## **Mission Statement**

*First Judicial District Bar Association*

The purposes of the Association shall be to enhance the practice of law within Jefferson County and Gilpin County, to promote professionalism and the administration of justice, to encourage legal education, to uphold the honor and dignity of the bar, to cultivate cordial relations among the legal community of Jefferson County and Gilpin County, to perpetuate the history of the profession and the memory of its members, to facilitate and improve the provision of legal services to the community, and to administer the budget for professional, social and community-oriented purposes.



**PROFESSIONALISM IN THE PRACTICE OF LAW**  
*Presented by David Littman, Esq.*  
10/8/2019



	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
<b>Learning objectives for this program were clearly defined</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Instructional methods included scenarios, exercises, or discussions that engaged me in the learning process</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>My knowledge in one or more areas of the program has expanded as a result of this course</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>This course contributed valuable strategies that I will use to address in my future practice</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Ways in which I approach and/or conduct my practice of law may change as a result of participating in this course</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>I am satisfied with the quality of the course faculty</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>