Section Expectations
2019-2020

To: Section Chairpersons

From: Ndidi Moses, President (2019-2020)

Date: June 21, 2019

1) Re: Expectations for Section Activities for the 2019-2020 Bar Year

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Thank you for your commitment to lead your Section for the coming year. We know we will all start our terms with high expectations for a successful year. In the spirit of continuing improvement, here are our expectations for our Sections for the coming year.

Focus areas for this year:

1) Plan for the Year
2) Foster Diversity and Inclusion in CLE Programs and Section Leadership
3) Integrate Young Lawyers and Presidential Fellows and create a Succession Plan for New Leaders
4) Conduct Frequent Section Meetings and Produce CLE Programs that Qualify for NY and CT Credits
5) Facilitate Advocacy and Lobbying for Section Interests
6) Engage Your Leaders and Members
7) Have Fun

We are committed to helping you have the most successful year possible. Together we will help one another get connected, be successful and make a difference.

1) Plan for the Year

Success depends upon proper planning and creating a vision of the future for your Section. Each Section Chair should:

a) Schedule your regular section meetings for the year with the CBA office by August 12th.
b) Submit a plan outlining your major goals and objectives for the year, by September 27th. The expectations described below should be addressed in your plan.
c) Provide us with a mid-year progress report by January 15th.
d) Submit a proposed budget for the 2020-2021 Bar Year by February 3rd. This will help us in preparing our Association budget for the coming year.
e) Provide your final annual report by May 15th.

2) Foster Diversity and Inclusion

One of our priorities is to more fully implement our diversity inclusion policy and more specifically our [Strategic Diversity and Inclusion Plan](). This plan includes specific expectations for all of the CBA leadership, including the Sections (*See* Section II(E)). Please take the time to read the plan, and share it with your Executive Committee and your section at large.

Plan tangible steps to be as inclusive as possible in your Section activities including:. engage all members of your section to participate; actively recruite diverse attorneys to your section, executive committees, task forces, or subcommittees; support and participate in efforts to promote diversity within the State, CBA, and within local and affinity bar associations; collaborate with affinity bar assocaitions or the Lawyers Collaborative for Diversity; and ensure that all panels, programs, and CLEs include diverse lawyers.

Ensure your bylaws have a diversity and inclusion provision.

We expect each Section chair to plan and then report out on three to five tangible things that the section did this year in an effort to promote diversity and inclusiveness and the results achieved. We will share this information both at our mid-year report and at the end of the year, so that we can measure our progress. If you are looking for ways to foster diversity and inclusion, contact Amani Edwards, Director of Diversity and Human Resources aedwards@ctbar.org.

3) Integrate Young Lawyers and Presidential Fellows

The long term future of our Association depends on engaging our newer lawyers into our Section communities. The Presidential Fellows program will continue this year. We ask that each of you make a commitment to foster this program and personally encourage and support its integration into your Section. This will allow us to create a pipeline of new leaders and help you with succession planning.

This year we will continue our initative to improve integration of young lawyers into our Sections and promote collaboration among the Young Lawyers Section (YLS) and the senior CBA Sections. The goals of this initiative are to:

- Encourage the Young Lawyer's Section and CBA Sections to work effectively together and create opportunities for both.
- Provide the Young Lawyers Section Committee chairs with leadership opportunities within the section or committee.
- Maintain the independence of the YLS while bringing the energy and diversity of the YLS to each of your Sections.

To further these goals we will:

- Create and/or maintain a YLS Subcommittee as part of each Section. This will be populated by those attorney members of your section who meet the criteria for Young Lawyers (under 37 years old, or in practice for 6 years or less – whichever is later). This subcommittee will be chaired by the YLS Chairs for that section from the YLS Executive Committee. *Note: The YLS Executive Committee chairpersons do not correspond to each and every section. If your Section has no corresponding YLS Executive Committee member, we ask that you appoint a chair to work with the group within your Section.*
- Appoint the YLS committee chairpersons as full voting members of your Section's Executive Committee.

We ask you to:

- Welcome and include the YLS chairs into your section leadership
- Include a standing agenda item for each meeting for the YLS Committee

4) Conduct regular Section Meetings and Produce CLE Programs

a) Section Meeting Frequency

Each Section should have at least five (5) in-person meetings throughout the year during the following months.

- September
- October / November
- December / January
- February / March
- April / May

Our most successful sections pre-set their meeting schedule for the year at the beginning of each year. I strongly encourage you to contact the CBA staff to get your meetings on the calendar as soon as possible but no later than **August 12th.**

All meetings need to be scheduled and coordinated with the CBA staff. Please do not schedule meetings or activities outside of our process.

b) Section Meeting Agendas and Minutes

Each meeting should have an agenda that includes certain components. The CBA staff will support you in creating and distributing your agendas. From time to time we will ask them to include additional information and items in each Section's agenda to further these expectations. We encourage you to be open to these items as they appear.

- Networking should include active person-to-person introduction of new members or those who have not attended before. It is the leadership's responsibility to make new members feel welcome and encourage them to return and participate. This should be a joint responsibility of all of the Section's officers.
- Business elements should run according to an agenda published in advance. Standard agenda items should include reports from each officer position, the liasions and the Young Lawyer Section (YLS) chairs.
- Substantive elements can include educational speakers, roundtable conversations and/or other content. This is typically what draws your members to attend. It should be scheduled for about 30-50% of your meeting time. We encourage you to produce a mix of substantive content to meet the needs of your members, including:
    - Introductory content for newer lawyers
    - Intermediate content for mid-career lawyers
    - Advanced content for more senior practitioners

This programming usually qualifies for Connecticut CLE credit under the MCLE rule. (Section 2-27(A) of the Superior Court Rules)
Subsection (c)(6) of the rules states that:
"To be eligible for continuing legal education credit, the course or activity must: (A) have **significant intellectual or practical content** designed to increase or maintain the attorney's professional competence and skills as a lawyer; (B) constitute an **organized program of learning** dealing with matters directly related to legal subjects and the legal profession; and (C) be **conducted by an individual or group qualified by practical or academic experience**."

We have established procedures to provide credit to members for Section Meeting CLE program, and have the credit tracked to member profiles when their attendance at the meeting has been recorded after the event by CBA staff. We have interpreted (c)(6)(B) to require the program to have a planned schedule that has been communicated to us with adequate time (a minimum of 3 weeks) to set up the credits in our system. Should the meeting provide instruction time that exceeds what has been communicated to us and set up in our system, members in attendance can independently record that time to their profiles (https://members.ctbar.org/members/certifications.aspx | use the green plus sign) but CBA staff will not adjust the number of credits originally requested for the meeting.

- Submit post-meeting paperwork to CBA Member Service within 24 hours of your event and meeting minutes within 30 days for posting on the Section's webpage. This is particularly important if there is CLE credit available for attendance.

NY CLE: New York State CLE Board CLE Program Rules s. 1500.4(b) Standards:

- One (1) hour of continuing legal education credit shall consist of at least 50 minutes of instruction, exclusive of introductory remarks, meals, breaks, or other non-educational activities.
- The course or program must have significant intellectual or practical content and its primary objective must be to increase the professional legal competency of the attorney in ethics and professionalism, skills, law practice management, areas of professional practice, and/or diversity, inclusion and elimination of bias.
- The course or program shall be taught by instructors with expertise in the subject matter being taught and shall be specifically tailored to attorneys.
- The faculty of the course or program shall include at least one attorney in good standing, who shall actively participate in the course or program. [effective January 1, 2008]

- The course or program shall not be taught by a disbarred attorney, whether the disbarred attorney is the sole presenter or one of several instructors. [effective August 2, 2007]
- The continuing legal education course or program must be offered by a provider that has substantial, recent experience in offering continuing legal education to attorneys, or that has demonstrated an ability to effectively organize and present continuing legal education to attorneys. [formerly 1500.4(b)(4)]
- Thorough, high quality, readable and carefully prewritten materials must be made available to all participants at or before the time the course or program is presented, unless the absence of materials, or the provision of such materials shortly after the course or program, is pre-approved by the CLE Board. Written materials shall satisfy the criteria set forth in the Regulations and Guidelines. [formerly 1500.4(b)(5)]

c) Section Meeting Formats and Locations
We encourage you to experiment with meeting formats other than the traditional sit-down dinners at higher-end resturants. These have typically been effective, but we also hear that some members are deterred by the price and/or the location. A number of sections have had great success with extended networking and lighter fare followed by substantive discussions. Also consider holding meetings or supplemental events in locations that vary to meet the needs of members from the corners of our state. Your CBA staff will work with you to find location(s) that are suitable.

d) Production of CLE Programming
CLE Programs for the Connecticut Legal Community
We rely on our Sections to produce high quality, applied continuing legal educational content for our members and the public, outside of your regular Section meetings. The production of CLE provides value to members and attracts those not in your Section to become a member and those not in our association to join us. Ideally each Section will produce a CLE program during our bar year (or co-produce a program with another section).

All CLE programming is coordinated with the help of an education liasion from your Section (who you should appoint) and CBA staff under the guidance of our Director of Continuing Legal Education and Section Programming, Tom Genung.

We know that each Section and the practice community you support may have unique needs and capabilities when it comes to CLE. We ask you to continue the good work that you have been doing and to coordinate your efforts with Tom and his team. He will be in touch with you separately regarding specific expectations for your Section over the summer. If you have ideas for CLE programming now, please contact him to start the planning process early. To ensure the most successful CLEs you should allow for at least 90 days of advance planning. This means that if you want to produce CLEs in September or October you need to begin the process now. For more information you can start at www.ctbar.org/cle or contact Tom at tgenung@ctbar.org.

Please note: Section Meeting CLE v. CBA CLE
There are some key differences you should consider when deciding how to present an education program.

1) **Section meetings**:
   a. Only section members may attend these programs.
   b. Marketed only to section members
   c. Supported by CBA section event support staff and resources.
   d. Costs are covered from event registration fees, and any additional revenue or loss is run through the section funds.
2) **CBA CLE**
   a. Anyone can attend.
   b. The program and speakers are marketed to all Connecticut attorneys, including in direct mail.
   c. Produced using the education, events, and communications and marketing teams and all their resources.
   d. CBA staffs the event and manages all relationships with any venues and vendors involved.
   e. Usually, the program is recorded and offered as an on-demand product for those who cannot attend.
   f. Costs are covered from event registration and any sponsorship revenues, and all income from the event goes to support the overall CBA budget.

e) Section Executive Committee Meetings.
Your Section Executive Committee should generally meet in advance of your regular meetings, and as needed by phone or videoconference at other times throughout the year.

5) Facilitate Advocacy and Lobbying for Section Interests
Our Sections have just completed another year of extraordinary success in our lobbying and advocacy efforts. As our influence as an Association continues to grow the role of our Sections will become even more important. I encourage you to have a strong team of members to support your Legislative Liasion and consider opportunities to be more proactive to identify issues of importance to your section members and the clients they serve. Early identification and action improves member engagement and our opportunities to make a difference. We will have a legislative advocacy workshop for interested Section members again this fall to assist you in this endeavor.

6) Engage Your Leaders and Members
Our ultimate success as an Association depends on having an engaged membership. This includes both your leadership team and functional liasions, your Executive Committee members, Section members, and the members at large. As an association, only about 55% of the members in a practice area have elected to become members of a Section. When we demonstrate the value of our Section, these numbers will increase and we will be even more prepared for the future.

We ask you to consider and implement strategies to improve engagement of our Section, including:

- Robust use of your SideBar ListServ community to share knowledge, ideas and experience. We will have a training available in the fall for those assigned to be facilitators of these conversations.
- Proactive outreach to new Section members. The CBA staff will provide you with regular updates on members who are new to your Section. I encourage you to reach out to them with personal message(s) and phone calls to get to know them and encourage participation in your activities.
- One to one outreach when new(er) members come to your meetings. This includes having a plan to make them feel welcome, meet other members and become involved.
- Active promotion of attendance at your events. The CBA staff publicizes all events – and we produce more than 350 per year. We encourage event organizers to engage in personal outreach to drive attendance at events. There is no substitute for peer to peer marketing.
- Active promotion of the good works of your members. Don't keep good news to yourself. We are happy to share successes and accomplishments with the membership at large and the public as appropriate.
- Utilize social media and virtual platforms such as Zoom Meeting to conduct meetings and programs.

The Staff and Officers are here to support your efforts. Use the resources we have provided to you to make your jobs easier and accellerate your success. If you have any questions or concerns during the year please reach out to us.

7) Throughout the Bar year we hope you enjoy your time as section leaders. To ensure we are addressing your concerns, we will convene monthly check-in calls with chairs.