SDCBA Leadership Orientation: Sections & New Lawyer Division  
January 22, 2020 (12:00pm - 1:30pm)

AGENDA

Part 1: General Overview (12:00pm – 12:45pm)

- Mission Statement and Core Values
- Section Executive committee structure and their responsibilities
- Process to fill vacancies on your Executive Committee
- Roles and responsibilities of leadership vs. staff
- SDCBA Point of Contacts
- Judicial Liaisons
- Resources to connect with each other and with your members
  - 2020 Section & NLD Roster (committee roster will be added in Feb)
  - How to use the listserves, file share and individual directories
  - Individual webpages and social media pages and policies
- Request for a Public Position or Comment
- Fundraising
- Meetings
  - How to schedule
  - Committee Meeting written minutes/reports for Board
- Important Policies
  - Conflict of Interest
  - Antitrust
Part 2: Producing Programs and Events (12:45pm – 1:30pm)

- **Getting Started**
  - Meet with your Executive Committee
  - Understand your section needs and what was successful in the past
  - Survey members for ideas and input

- **Types of Activities to Engage Your Members**
  - Education
    - Types
    - SDCBA Series
    - Speakers
    - Collaboration
    - Format
    - Virtual engagement (listserve, filshare, webpage)
  - Social Events
  - Mentoring
  - Community Service

- **Annual calendar planning**
  - Proposed slated activities for the year due by March 1st
  - Obtaining dates

- **How to submit proposed activities**
  - Activity Sheet

- **Marketing**
  - 4-6 week lead time

- **Co-production and Sponsorship**

- **Programming Pricing**

- **EVENT REMINDER**: Law Student Welcome Reception and Legal Community Open House
  - January 29th (5:30pm – 7:30pm)
  - Each Section & NLD will have their own table to staff
Part 1:
General Overview
About the SDCBA

The San Diego County Bar Association, founded in 1899, is the hub of San Diego’s diverse legal community. Our membership includes new and veteran attorneys practicing in various areas of law throughout the county and other legal professionals that support the profession and practice. With more than 50 unique Sections, Committees and divisions, a state-of-the-art full-service member lounge and shared workspace, various community service projects, informal and association-wide networking events, along with more than 300 hours of quality continuing legal education (CLE) and supplemental education programs each year, the SDCBA is the place where San Diego’s legal professionals connect and convene for the betterment of their individual practices and the profession.

Our Mission

Inclusion and community define us. Innovation and leadership propel us. Your growth motivates us. Celebrating you and the profession is us.

Our Core Values

Community: Building meaningful, lasting connections
Inclusion: Everyone is invited and welcome.
Innovation: At the forefront of change.
Leadership: Leading the way for the profession.
Celebration: Celebrating each other and the profession.
Growth: Growing your practice, business, and brand.

Value Statements

- We are a community and serve as the home for San Diego’s legal professionals. This is the place to build long lasting, meaningful connections.
- We value inclusion - the SDCBA welcomes everyone, and everyone belongs.
- We are changemakers, leading the way and innovating to ensure that we are at the forefront of change.
- We foster and encourage growth, assisting attorneys in developing their relationships and their practices;
- And we recognize, honor and celebrate lawyers and their important role in our world.
Each section’s Executive Committee consists of a Chair, a Vice Chair and between 1-3 at Members at Large, and one New Lawyer Member at Large. It is up to each Executive Committee to determine how best to delegate and manage the section’s responsibilities. Each Chair will be asked to let the SDCBA know by a certain date who on the Executive Committee will be the point person for each of the following areas. In some sections, subcommittees of volunteers may be established to help handle the work, provided they report to an Executive Committee member. Each Executive Committee can determine how often it should meet and the forum to meet (in person or via conference call). Specific responsibilities may include:

1. Educational Programming:
   a. Develops formal CLE programming for members in conjunction with other sections or relevant external groups.
   b. Develops informal educational programming that disseminate information and provide opportunities for members to discuss relevant issues.

2. Networking:
   a. If the group hosts mixers, coordinates these events or joint events other SDCBA groups.
   b. Coordinates any desired community service opportunities for section members.

3. Programming for law students and new lawyers:
   a. Plans programming and opportunities that integrate law students and new lawyers into section activities. Helps identify members to assist with SDCBA sponsored events, including career development circles and ambassadors to help introduce new lawyers to more established members of the bar.

4. Communications and Web Liaison:
   a. Updates the section website and Facebook page to reflect current activities and announcements in accordance with SDCBA policy.
   b. Monitors the section’s list serve in accordance with SDCBA policies and procedures.
   c. If used, helps promote and manage items posted to the file share in accordance with SDCBA policies and procedures.
   d. Works with the SDCBA internal Communications Team, as needed.
5. Policy and other programming:
   a. Liaises with the SDCBA’s Legislative Committee to ensure that the section is identifying necessary changes in its area of law to better the practice area; develops proposed resolutions, if requested, for the annual Conference of Delegates at the Conference of California Bar Associations.
   b. If other policy comments are requested by outside entities, ensures any proposed comments are taken to the SDCBA Board pursuant to the SDCBA’s policies regarding legislative and public comment.
   c. If approved, ensures SDCBA sponsored or co-sponsored programming for the public is developed and implemented in accordance with SDCBA policies and procedures.

6. Leadership Development and Collaboration
   a. Helps identify future leaders to the SDCBA Board.
   b. Liaises with assigned judicial liaisons, if applicable.
   c. Works collaboratively with the SDCBA internal team regarding program planning, timelines and processes.
Position Description: Chair

Elected each year, the Chair oversees all activities of the section to ensure the section meets the SDCBA’s goals and objectives.

1. Presides over the section’s executive committee.
2. Ensures all tasks assigned to the section are planned and coordinated in collaboration with the SDCBA leadership and the internal team in accordance with the SDCBA’s timelines and processes. This includes:
   A. Creating practice-area specific educational programs to further the education of both seasoned colleagues and new and emerging lawyers, through a variety of formats including formal MCLE’s and informal programming such as roundtable discussions and other educational events that provide opportunities to discuss hot topics;
   B. Creating networking opportunities and events;
   C. Ensuring all members of the section at all stages of their careers are able to participate and find relevant activities relevant.
3. Attends all orientations, meetings and events planned by the SDCBA for section Chairs and makes an effort to attend programming and events that are not mandatory.
4. Acts as the main liaison to the SDCBA’s leadership and the internal team, and provides reports to the Board of Directors as requested.
5. If the section holds regular general meetings, prepares meeting agendas and distributes relevant information to all members prior to the meeting.
6. Encourages active participation by section members in the activities of the section and the SDCBA. This includes encouraging new attorneys to participate in programming and events, as well as encouraging mid and late career members to formally or informally mentor newer attorneys.
7. Assists the SDCBA President in identifying potential leaders among section members, as needed.
8. Liaises with assigned Judicial Liaisons, if any. Depending on the section, may sit on a bench bar committee or have other liaison responsibilities.
9. Performs other duties assigned by the SDCBA President and Board-level committees.
10. Adheres to and ensures the Executive Committee Roles & Responsibilities are met. (See Roles and Responsibilities: Section Executive Committee)
Elected each year, the Vice Chair assists the Chair in overseeing all activities of the section to ensure that it meets the SDCBA’s goals and objectives. Vice Chairs may run for Chair the year after serving as Vice Chair to address continuity in programming and planning.

1. Assumes the duties of the Chair in his or her absence.
2. Assists the Chair in ensuring all tasks assigned to the section are planned and coordinated in collaboration with the SDCBA leadership and the internal team in accordance with the SDCBA’s timelines and processes.
3. Attends all orientations, meetings and events planned by the SDCBA and makes an effort to attend programming and events that are not mandatory.
4. Encourages active participation by section members in the activities of the section and the SDCBA. This includes encouraging mid and late career members to formally or informally mentor newer attorneys.
5. Performs other duties assigned by the Chair, or the SDCBA President.
6. Adheres to and ensures the Executive Committee Roles & Responsibilities are met. (See Roles and Responsibilities: Section Executive Committee).
Position Description: Member At Large

Elected each year, the Member At Large of the Executive Committee (up to 3 depending on the section) works with the section Chair and Vice Chair to ensure the section meets the SDCBA’s goals and objectives.

1. Attends all meetings and events of the executive committee.
2. Carries out individual assignments that are made by the section’s executive committee.
3. Adheres to the Executive Committee Roles & Responsibilities. (See Roles and Responsibilities: Executive Committee)
Position Description:
New Lawyer Member At Large

Elected each year, the New Lawyer Member At Large of the Executive Committee works with the section Chair and Vice Chair to provide the new lawyer voice and perspective and to ensure the section meets the SDCBA’s goals and objectives.

1. Attends all meetings and events of the executive committee.
2. Carries out individual assignments that are made by the section’s executive committee.
3. Adheres to the Executive Committee Roles & Responsibilities. (See Roles and Responsibilities: Executive Committee).
4. Acts as new lawyer liaison for the section, assists with educational programming, engagement and facilitates coordination between the section and the New Lawyer Division.
SDCBA Post-Section Election Open Positions/Vacancies

• In the event a section has an open seat on its executive committee after an election has been held and confirmed, the position will be considered open.

• Any member, including a member who ran in the election, interested in any open position should contact the chair of the section.

• The chair will vet all requests and make any recommendation if an open seat should be filled by appointment.
  o **Recommendations are to be sent to Olga Blankson, oblankson@sdcba, summarizing the candidate’s qualifications and why the chair is recommending the individual.**

• Any recommendation must be reviewed and approved by the Governance Committee and ratified by the Board.

Removal of Elected and/or Appointed Section Committee, and New Lawyer Division Leadership

• Pursuant to the Bylaws, all Section, Committee, and New Lawyer Division leadership serve at the pleasure of the Board.

• Failure to act in accordance with civility, integrity and professionalism to members of the bar and the SDCBA’s internal team may result in a chair, vice chair or other member of an executive committee being removed.
### Roles and Responsibilities for Activity & Meeting Planning: Leadership vs. Staff

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<th>Activity</th>
<th>Leadership</th>
<th>SDCBA Staff</th>
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| **Education Program**           | • Identify topics and create slate of programs for the year  
• Identify other sections or committees to co-produce  
• Identify potential speakers and outreach  
• Obtain needed materials from speakers  
• Assistance with promotion and marketing | • Identify available dates  
• Schedule and calendar programs  
• Assistance with promotion and marketing  
• Handle all registration and day-of logistics  
• Record attendance and CLE  
• Handle all sponsorship negotiations |
| **Networking/Social Events**    | • Determine type/concept of event  
• Reach out to other sections or committees to co-produce  
• Assistance with promotion and marketing  
• Be onsite to handle day-of logistics | • Identify available dates  
• Schedule and calendar events  
• Assistance with promotion and marketing  
• Handle all registration and day-of logistics  
• Record attendance and CLE  
• Handle all sponsorship negotiations |
| **Meet-up: Event & Community Service** | • Identify activities  
• Coordinate with staff to set a date  
• Be point of contact for any participants  
• Solely responsible for promotion and marketing  
• Be onsite at event to coordinate logistics | • Calendar and open RSVP  
• Provide list of attendees to coordinator |
| **Meeting (SDCBA on-site)**     | • Coordinate with staff to schedule  
• Create agenda and coordinate attendance  
• Prepare and print materials  
• Save meeting notes in to fileshare | • Reserve room  
• Order food |
2020 SDCBA POINT OF CONTACTS

PROGRAMS & EVENTS INQUIRIES

- Sarah Harris, Director of Programs & Events
  - sharris@sdcba.org
  - 619.321.4112
- Maribel Sanchez, Program & Event Specialist
  - msanchez@sdcba.org
  - 619.321.4118

GOVERNANCE, POLICY & LEADERSHIP INQUIRIES

- Olga Blankson, Executive Assistant & Leadership Coordinator
  - oblankson@sdcba.org
  - 619.321.4113
- Jill Epstein, Executive Director
  - jepstien@sdcba.org
  - 619.321.4111
- Johanna Schiavoni, SDCBA Board President
  - johanna@schiavoni-law.com
  - 619.269.4046
2020 SDCBA Judicial Liaisons

Alternative Dispute Resolution Section
- Judicial Liaison: Judge Randa Trapp (randa.trapp@sdcourt.ca.gov)
- Section Chair: Bob Flynn (bobflynn@coasttocoastADR.com)

Civil Litigation Section
- Judicial Liaisons
  - Judge Eddie Sturgeon (eddie.sturgeon@sdcourt.ca.gov)
  - Judge Kevin Enright (kevin.enright@sdcourt.ca.gov)
- Section Chair: Sean Pontist (sponist@ponistlaw.com)

Elder Law Section
- Judicial Liaisons:
  - Judge Tamila Ipema (tamilia.impema@sdcourt.ca.gov)
  - Judge Cindy Davis (cindy.davis@sdcourt.ca.gov)
- Section Chair: Robert Dieringer (rdieringer@gbflawyers.com)

Environmental Law Section
- Judicial Liaison: Judge Tim Taylor (timothy.taylor@sdcourt.ca.gov)
- Section Chair: Avneet Sidhu (aks@lfap.com)

Estate Planning, Trust & Probate Section
- Judicial Liaisons:
  - Judge Julia Kelety (julia.kelety@sdcourt.ca.gov)
  - Judge Jeff Bostwick (jeffrey.bostwick@sdcourt.ca.gov)
- Section Chair: Matt Owens (matthew.owens@withersworldwide.com)

Labor & Employment Law Section
- Judicial Liaison: Judge Kevin Enright (kevin.enright@sdcourt.ca.gov)
- Section Chair: Sierra Spitzer (spitzer@brownlawgroup.com)

New Lawyer Division (NLD)
- Judicial Liaison: Judge Joel Wohlfeil (joel.wohlfeil@sdcourt.ca.gov)
- NLD Chair: Stephanie Sandler (ssandler@hoguebelonglaw.com)
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**Family Law**

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**Immigration Law**

**Insurance/Bad Faith Law**

**Intellectual Property Law**

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**Juvenile Law**
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**Law and Medicine**

**Military Law**

**Real Property Law**

**Social Security Disability**

**Taxation Law**

**Workers’ Compensation Law**

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SDCBA Listserv Guidelines

Listserv Guidelines

The SDCBA’s listserv are self-monitored communities for sections, committees, divisions, and interest groups, and are provided to help foster collaboration, civil discourse, mentorship and meaningful dialogue amongst lawyers as well as non-lawyer members of the SDCBA. While listservs are used from time to time to promote SDCBA programs and services, for the most part, discussion is generated and monitored by the members of each listserv.

Please note:

- Any member of an SDCBA section, committee, division or interest group may participate in its listserv.
- Listservs can be used in any way that serves the interests of the community it serves; if an issue arises, it should be addressed with Section, Committee, Division or Interest Group leadership.
- While guidelines exist (see below), the SDCBA’s team does not monitor the listservs consistently, and will only directly address profane or disruptive behavior at its discretion.
- The SDCBA reserves the right to remove any member of any listserv at any time if conduct is unprofessional, disruptive, or does not adhere to the SDCBA’s standards of civility, integrity and professionalism.
- All listserv participants agree to defend, indemnify and hold the SDCBA harmless from and against any damages arising out of or resulting from that person’s online conduct in a listserv.

In addition to general dialogue, please note the following suggested listserv uses and prohibitions:

a. Listservs may be used to share information about CLE/educational programs or events of other organizations provided that the content or topic of the program or event does not overlap in nature and/or timing with a program hosted or sponsored by the SDCBA. If a listserv user would like to post a program, after reviewing the SDCBA’s calendar to ensure it does not duplicate, replicate, or cover the same topic as an upcoming SDCBA program, the following guidelines should be reviewed and adhered to:

i. Program information should only be shared if it is presented by the State Bar of California, the American Bar Association, an accredited law school, any of our approved Law-Related Organizations, or events that have been approved by the Section, Committee or Division’s leadership or internal leadership team can be posted.

ii. The program or event cannot take place within 30 days of similar SDCBA programming or events so that any marketing does not compete with the SDCBA’s program marketing efforts.

iii. Violation of the guidelines for posting CLE and other educational programming deemed to be competitive in nature with programs produced or sponsored by
the SDCBA may result in a user’s removal from the listserv, at the discretion of the SDCBA’s leadership and internal team.

b. Listservs may be used to announce office space for lease, or to request experts. Otherwise, there should be no commercial use of the listservs (i.e. Listservs should not be used to exchange services, materials or software in return for payment of any sort – including trade of like items, special discounts, cash, etc.). Unlawful, threatening, abusive, libelous, defamatory, obscene, pornographic, profane, annoying, vexing, harassing, or otherwise objectionable information of any kind may not be posted to the listserv, including, without limitation, any transmissions constituting or encouraging conduct that would constitute a criminal offense, give rise to civil liability, or otherwise violate any local, state, national or international law.

c. Postings that encourages or solicits others to engage in anti-competitive activities, including attorney rate information, is not permitted.

d. Listserv messages should not be posted elsewhere by recipients or forwarded to any non-SDCBA member without the original poster’s consent, particularly where it may have an effect on a case.

e. Section, Committee, Division and Interest Group listservs should be used to discuss topics of interest to their constituencies – particularly the area of law or common issues, practices, questions and news that impacts practitioners in that area of law. For community service projects and volunteer opportunities, users are encouraged to use the community service committee listserv or submit information to bar@sdcba.org for consideration in This Week at the Bar.

f. Messages should not promote any fundraising efforts or solicit donations unless the beneficiary is the San Diego County Bar Foundation, the charitable arm of the SDCBA, unless the effort has been approved as part of the SDCBA’s Community Service or outreach efforts.

g. Listservs may not be used to endorse political candidates running for any office.

Sections, Committee, Division and Interest Group (Entity) leaders, please note:

SDCBA Entities may not:

- Take a position on behalf of the organization without the approval of the Board, on the listserv or otherwise (see Public Position Policy).

- Endorse or support a political candidate, ballot, proposed legislation, proposed governmental action, or initiative in the name of the organization, on the listserv or otherwise.

- Endorse any candidate, whether a section or committee member or not, for the SDCBA Board, or any other bar organization volunteer leadership position.

Separate rules apply for how candidates for the SDCBA Board, Section and Committee leadership positions, and other local bar boards may campaign, however with regards to the listservs, please note:
Any listserv participant may:

- Announce their candidacy one time for the SDCBA Board and seek the support of the listserv constituency, with the pre-approval of the Executive Director.
- With the pre-approval of the Executive Director, announce their candidacy once for another bar organization’s volunteer leadership position, and seek the support of the listserv constituency.
- Announce their candidacy for a leadership position within their section or committee one time. The announcement may only be posted to the listserv for the section or committee for which the candidate is seeking election.

No member may post information or advocate via the listserv on behalf of any candidate other than themselves for the SDCBA’s Board election or any other elected position.

**Listserv Violation Procedures**

As self-monitored communities, issues that arise on a listserv, such as improper use, incivility or failure to adhere to listserv guidelines, should be addressed to the Section, Committee, Division or Interest Group’s leadership.

Section, Committee, Division, and Interest Group leaders are encouraged to:

a. Contact the individual directly.

b. Share the listserv guidelines with the entire community.

c. Review former listserv guideline violations by the individual.

d. Determine if an offense merits potential removal from the listserv, and if so, make a recommendation to the SDCBA’s Director of Outreach Strategy and CCO, as well as the Chair of the Leadership and Governance Committee. Leaders are encouraged to provide at least one warning to listserv members prior to recommending removal from a listserv.

The SDCBA will review any recommendations for an individual to be removed from the listserv and take action accordingly. An individual's listserv privileges may be immediately suspended pending investigation at the discretion of the SDCBA.
SDCBA Guidelines for Social Media Pages

Represent the SDCBA and our profession well. Exercise good judgment. Entities and individuals who fail to do so, or who fail to comply with the SDCBA’s social media and Association policies, in addition to the following guidelines, may forfeit the right to participate in social networking activities associated with the SDCBA.

**Be responsible.** You are responsible for the material you post. Carefully consider content; what you publish will be widely accessible for some time and, in some cases, indefinitely. All statements must be true and not misleading. Do not post private information about yourself or others. Keep the posts relevant to SDCBA’s mission and/or goals. Adhere to all statutory prescriptions and Rules of Professional Conduct governing the privacy of individuals and confidential information.

**Be upfront; identify yourself in online discussions.** Use your real name, and, if relevant, your role or interest in the topic discussed. When appropriate, make it clear you are speaking for yourself and not on SDCBA’s behalf.

**Be civil and respectful.** Do not use defamatory, libelous, or damaging innuendo; abusive, threatening, offensive, obscene, explicit, or racist language; or post illegal material.

**Be quick to correct an error.** If you make a mistake, quickly provide the correct information. If appropriate, modify an earlier post to make it clear that you have corrected an error.

**Keep it relevant/add value.** Information can add value if it contributes to the knowledge or skills of an SDCBA members or builds a sense of community.

**Follow copyright and fair use laws.** Always give people proper credit for their work. Make sure you have the right to use material with attribution before publishing. It is a good practice to link to others’ work rather than reproducing it on your site. When in doubt as to the proprietary nature of material, don’t use it. Recognize the potential professional and legal consequences of any failure to follow applicable laws governing the use of others’ material.

**Protect proprietary and client information.** Do not discuss or misuse proprietary or confidential information and follow all professional and ethical rules governing the disclosure of such information.

**Avoid politics.** Political endorsements may not be made via the SDCBA’s social networking pages. Messages must comply with the SDCBA’s policy on endorsements.

**Legal Restrictions.** Comply with all legal restrictions and obligations governing professional conduct, particularly those regulating communication and advertising, when posting content to any social network, including postings by an entity.

**Do not violate antitrust laws.** Antitrust laws prohibit postings that encourage or facilitate agreements between SDCBA members of different organizations concerning the following, as they pertain to prices, discounts, salaries, cost data, or any other term or condition related to competition.

**Abide by the social network’s rules.** Review the terms of use of each social network carefully.

**Refrain from disparaging discussion of the SDCBA, its leadership, and its policies.** SDCBA Social Media users will refrain from using social media as an opportunity to disparage SDCBA priorities, leaders, programs or initiatives.
SDCBA Social Media Guidelines for Postings/Retweeting/Sharing for SDCBA Internal and Volunteer Leadership with Social Media Responsibilities/Oversight

The following questions and guidelines should be analyzed by SDCBA internal and volunteer leaders responsible for the content of SDCBA social media pages when posting/reposting/sharing or tweeting/retweeting information. The following provides some considerations as a supplement to the SDCBA’s Social Media Policy, which should be adhered to throughout all social media channels.

- **Post:**
  - Is there value in this post for SDCBA members specifically?
  - Is the tone of the posting consistent with the SDCBA’s voice and brand?
  - Will the post create a positive perception of the legal profession and San Diego’s legal community?
  - Does the posting represent an important trend or a changing dynamic for the profession?
  - There is something in this post that is interesting or impactful to practicing lawyers, law students, or other legal professionals in San Diego that would not be interesting or impactful to the general public?
  - Does the post further the SDCBA’s position as the “voice” of the legal community?
  - Strongly consider before posting whether the SDCBA can add to this conversation in a meaningful way if:
    - This post can be construed as political or controversial in any way, or there will be a strong division of opinion among members of the SDCBA about the matter of this post.
    - The post shows a bias or overly presents one particular point of view in a way which could be attributed to an SDCBA bias.
    - If the subject negatively reflects the legal community, particular law firms, or particular attorneys or is disparaging.
    - There is an organization or organization that have already shared this post sufficiently and our posting would seem duplicitous and would not add value to the conversation.

**Do not post if:**

- This post serves a commercial or sales purpose for non-SDCBA goods or services, with the exception of SDCBA Member Benefit partners, event sponsors, and other pre-approved vendor partners.
- The information or subject matter of this post does not maintain the professional and ethical standards of the SDCBA.
Terms of Use - SDCBA Social Media Pages

The following terms and conditions are to be posted or linked to from the information section of the SDCBA’s main social media pages (where applicable), and included on the SDCBA website. This information is intended for the end-user/audience, and not SDCBA leaders or social media administrators in particular.

Nothing posted on the SDCBA’s social media pages is meant to constitute legal advice or to imply there is a business, personal, or attorney-client relationship with any fan or follower. We assume no responsibility for any postings or their content. We do not vouch for or warrant the accuracy, completeness or usefulness of any message.

By using social media related to the SDCBA, you agree not to post any abusive, obscene, vulgar, slanderous, defamatory, knowingly false, inaccurate, hateful, threatening, harassing, and invasive of a person’s privacy, sexually-oriented or any other material that may violate any applicable laws.

You agree not to post any advertisements or solicitations of business. The reproduction of published materials is not permitted. You agree not to post any copyrighted material unless the copyrighted material is posted with permission. Doing any of the foregoing may lead to a ban from the use of the SDCBA’s social media mediums. We reserve the right to reveal your identity in the event of a complaint or legal action arising from any message posted by you.

You agree to indemnify and hold harmless the SDCBA and its affiliates, and their respective members, directors, officers, managers, employees, shareholders, agents, and licensors, from and against all losses, expenses, damages and costs, including reasonable attorneys’ fees, resulting from any violation by you of our terms of use.

We do not actively monitor or review all postings; however, the administrator and moderators of this page have the right to remove, edit, move or close any topic at any time as they see fit, or block or remove any user. As a user you agree to any information you have entered on this site being stored in a database. You acknowledge that all posts made to this site express the views and opinions of the author and not the SDCBA or its internal team members or any entity associated therewith and hence we will not be held liable for any such postings.

Information posted by the SDCBA may only be re-posted or re-tweeted verbatim, and may not be altered beforehand. Commercial use of any content is strictly prohibited. We may provide links on this site as a convenience to users. We do not endorse, and make no representations or warranties regarding, any of the linked websites, the content of the sites or the product and services offered through these sites.

All material posted by the SDCBA (including, without limitation, text, photographs, graphics, video and audio content) is protected by copyright as a collective work or compilation under the copyright laws of the United States and other countries, and we (subject to the rights of its licensors and licensees under applicable agreements, understandings and arrangements) have rights therein. All individual articles, videos, content and other elements comprising this site are also copyrighted works and we (subject to the rights of its licensors and licensees under applicable agreements, understandings and arrangements) have rights therein.

You agree that we may modify the terms of use (or discontinue our use of this site or page) in our sole discretion, without advance notice, and that your right to access this site is conditioned on an ongoing basis with your compliance with the then-current version of these Terms and Conditions. You should therefore visit this page frequently.
Through your use of social media to access information about the SDCBA, you expressly agree that use of this social media platform is at your sole risk, and there is no warranty that your access or use of this site will be uninterrupted or error free, or that particular results may be obtained by use of this site. We are not liable for any viruses, worms, "Trojan horses" or other destructive materials possibly contained within this site. It is the user’s responsibility to stay appraised of the social media site they are using.
GUIDELINES FOR SDCBA PUBLIC POSITIONS AND COMMENT

GENERAL
As part of the SDCBA’s strategic framework and communications plan, the SDCBA serves its constituency and the public by educating and providing information on law-related issues pertaining to the Association’s mission.

The SDCBA has developed a process and guidelines to evaluate when it will take public positions or issue public comments.

TYPES OF ISSUES
The SDCBA will consider taking a public position or providing comment when the issue educates/informs the public, is in line with its mission/strategic framework and when such issues may impact:

- Administration of justice (including respect for the rule of law and the judicial branch);
- Diversity and inclusion in the profession;
- Professionalism/ethics;
- Civility;
- Equal justice under the law/civil liberties;
- Independence of the judiciary, including criticism of judges;
- Constitutional rights that impact the justice system; and
- Access to justice

WHO IS MAKING THE REQUEST
The SDCBA may consider taking a public position if a request is made by any of the following individuals or groups:

- Any member of the SDCBA (including Board members and section, committee, or division chairs);
- Any San Diego county, statewide or national law-related organizations;
- Any media reporter;
- A member of the judiciary

PROCESS TO SUBMIT A REQUEST FOR PUBLIC POSITION OR PUBLIC COMMENT
Requests for public position or comment, except from members of the news media, must be made in writing and sent directly to the President, any member of the SDCBA Board, or the Executive Director. Members of the news media may direct oral or written requests for comment to the President, the Executive Director, or the Director of Outreach Strategy/CCO. Those requesting public position or
comment will be asked to provide information sufficient for the Public Position Advisory Group ("PPAG") to evaluate the issue being addressed and the nature and scope of the comment sought. Specifically, those requesting public position or comment must provide the following information:

- Briefly describe the issue upon which position or comment is sought.

- Who specifically (an individual or organization) is making the request for public position or comment?

- Are you asking the SDCBA to take a specific position on the issue?
  - If so, what position are is the SDCBA being asked to take?

- Why do you believe the SDCBA should issue a public comment or take a public position on this issue?
  - Provide relevant background information/materials on the issue and position being requested.
  - Provide the timeline on which the issue is being considered and a position or comment must be issued to be relevant in weighing in on the issue.

**REVIEW AND RESPONSE PROCESS**

Once the complete information accompanying a request is received, the request will be forwarded to the President and the Executive Director for initial review. The President and/or the Executive Director will determine (1) whether the matter should be sent to PPAG for review, and (2) whether the matter must be addressed as either a “Time Sensitive Position” or an “Immediate Response” (as discussed herein). The initial review shall be performed as soon as possible.

If a decision is made not to refer a matter to PPAG, the President or Executive Director will report to the Board at the next board meeting the content of the request and the determination and also report back to the requestor. The following types of requests are not subject to this policy and will go directly to the SDCBA Board or other group for consideration:

- SDCBA Legal Ethics Committee comments on proposed or revised State Bar Rules of Professional Conduct, proposed State Bar Ethics Opinions, or proposed SDCBA Ethics Opinions will go directly to the Board;

- Appellate Practice Section comments on proposed or revised Judicial Council or Appellate Division rules of court will go directly to the proposing body;

- Other issues identified from time to time by the Executive Committee.

All other requests, including, but not limited to, requests to prepare an amicus brief, requests to add the SDCBA name to an amicus brief, requests to add the SDCBA name to a prepared letter or statement drafted by a member, organization, elected or appointed official, or other similar group or individual, or requests of a section or committee to comment/issue a public position, will be subject to this policy.
SDCBA Fundraising and Donations Policy

Donations

It is the policy of the SDCBA to not make financial contributions or donations to any charitable or non-profit organization other than the San Diego County Bar Foundation.

San Diego County Bar Foundation (SDCBF)

With regard to the SDCBF, the SDCBA assists it in raising money in the following ways:

• Provides an opportunity for members to contribute to the SDCBF by adding a SDCBF line item on the annual SDCBA dues invoice.

• Publicizes various SDCBF fundraising activities to the legal community, including the Distinguished Lawyer Memorial and “Evening In” events.

• Publicizes various SDCBF activities in SDCBA communications.

• May make direct financial contributions to the SDCBF.

• The SDCBA then relies on the SDCBF to determine need in the community and to assess the appropriate amount to give to various charitable and non-profit organizations.

Fundraising

In keeping with the SDCBA’s donation policy as set forth above, no section, committee, or division, or any other part of the SDCBA, may engage in direct fundraising activities (including producing or promoting charitable events) on behalf of or for another charitable or non-profit organization or cause, and no section, committee, or division may make a direct contribution to an outside entity or person in the name of the section, committee, or division.

Accepted Charitable Activities

Nothing herein is meant in any way to limit the SDCBA, or its sections, committees, or divisions, with proper permission, from doing the following:

• Participating or partnering in non-fundraising community service projects as set forth in the Community Services Projects Policy, consistent with its desire to assist charitable organizations in recruiting attorneys to volunteer on projects for those organizations.

• Purchasing a table or supporting a law related organization’s annual dinner or event.

• Co-sponsoring a fundraising event of a law related organization that provides access to legal services, or, in rare circumstances corresponding very closely with the SDCBA mission statement, other charitable organizations.

• Encouraging members to donate items and goods (non-monetary contributions including toiletries, paint, clothing, computers) in support of approved SDCBA community service activities (i.e., Wills for Heroes, Facelift)
SDCBA Conflict of Interest Policy

Definitions

A “conflict of interest” arises in any situation in which a Director’s personal, professional, or financial interests conflict with his or her responsibilities to the SDCBA. For purposes of analyzing conflicts of interest, Directors are to regard financial interests of immediate family members (parents, children, spouses, and spousal equivalents) as if they were the financial interests of the Director in question.

An “appearance of a conflict of interest” occurs when a reasonably informed person would perceive that the Director could be influenced by his or her personal, professional, or financial interests in conflict with his or her responsibilities to the SDCBA.

A “potential conflict of interest” occurs under circumstances that could develop into an actual conflict of interest.

Some Types of Conflicts of Interest

The following is a non-exhaustive list of types of conflicts of interest:

- **Self-dealing:** As a Director, the individual makes decisions that financially or materially affect the Director or his or her immediate family; or makes decisions that directly financially or materially affect an entity for whom the Director or an immediate family member provides legal representation or serves as an officer, director, trustee, employee, or controlling stockholder.

- **Accepting benefits:** As a Director, the individual accepts substantial gifts, bribes, services, or other significant benefits that may be perceived to influence the Director.

- **Influence peddling:** The Director accepts benefits in exchange for exerting influence or giving preferential treatment to the giver of the benefit.

- **Using confidential information:** The Director uses confidential SDCBA information acquired because of SDCBA work for private advantage.

Sections and Committees

The chairs of SDCBA sections, committees, and divisions, as well as members of closed committees (wherein the members are appointed by the President), have been entrusted by the membership and the Board to promote and protect the interests of the organization. Each section, committee, and division chair, and each committee member of a closed committee (collectively, “Committee Members”), should manage his or her personal, business, and section / committee / division affairs so as to reduce the likelihood of conflicts of interest or the appearance of conflicts of interest pursuant to the standards set forth in Section 1.5.

Acknowledgement of Policy

Chairs and Committee Members of sections, committees, and divisions that control the disbursement of funds, or make recommendations to the Board on the disbursement of funds, of the organization, shall acknowledge this policy in writing at the beginning of their service.
SDCBA Antitrust Policy

Antitrust Policy

Member communications at SDCBA or through use of SDCBA resources are intended for the education of participants and to provide an opportunity for participants to identify and address important trends and issues in the San Diego legal community.

While it is intended that participants will always maintain the tradition of free and open discussion, the members of the association must not use these forums to discuss matters in violation of state or federal antitrust laws.

Specific Examples of Antitrust Compliance Rules

- Member communications at SDCBA or through use of SDCBA resources shall not be used for the purpose of bringing about, or attempting to bring about, any understanding or agreement, written or oral, formal or informal, expressed or implied, among competitors with regard to their fees, terms or conditions of practice, sale, discounts, territories, or clients. For example, any agreement by competitors regarding fixing fees or adopting common fee arrangements; to “honor,” “protect,” or “avoid invading” one another’s geographic areas, practice areas, or client lists; or to engage in group boycotts would not be permitted.

Caution should be exercised when SDCBA collects data on usual and customary fees, workforce statistics, and job market opportunities. While the mere collection of data on such matters is permissible if certain conditions are met, concerns arise if the data becomes the basis for action in violation of antitrust law. When questions arise about the propriety of collecting such data, the SDCBA shall not undertake any activity that involves exchange or collection and dissemination among competitors of any information regarding fees, prices, pricing methods, cost of services or labor, or sales or distribution without first obtaining the advice of legal counsel. This does not apply to legal collection of attorney fee rates as allowed under the Rules of Professional Conduct and State Bar rules covering Lawyer Referral and Information Services.
Part 2: Producing Programs & Events
2019 SECTION & NLD PRODUCED PROGRAMS & EVENTS

ADR

EDUCATIONAL PROGRAMMING
Q1
- Jan 4: Roundtable: Coffee & Conversation “ADR Update for Neutrals"
- Jan 16: CLE: New Mandatory Disclosures Before Mediation & All the Key Confidentiality Issues-(co-produced with Civil Lit)
- March 1: Roundtable: Coffee & Conversation "Elder Claimant Context of a Mediation”
- March 27: CLE: Ethical Marketing and CA’s 70 new rules for lawyers

Q2
- June 7: Roundtable: Coffee & Conversation

Q3
- July 12: Roundtable: Coffee & Conversation “Mandatory Court Ordered Mediation”
- July 24: Non-CLE: Branding Ethically & Effectively for Lawyers & Mediators
- Sept. 6: Roundtable: Coffee & Conversation: Top Ten Mediators' & Advocates' Mistakes

Q4
- Dec. 6: Roundtable: Coffee & Conversation: Settlement Templates or Forms

NETWORKING & MENTORING EVENTS
- Aug 8: Mixer at Rock Bottom with Family, Juvenile, Immigration Sections

COMMUNITY SERVICE
- None proposed

ANIMAL

EDUCATIONAL PROGRAMMING
- Aug 22-23: CLE: 5th Annual Animal Law Summit

NETWORKING & MENTORING EVENTS
- March 14: Mixer at 278

COMMUNITY SERVICE
- May 4: San Diego Humane Society Walk for Animals
- July 11: Helen Woodward clothing drive
- Sept. 14: Fiesta Island Beach Clean Up (with Family Law)

APPELLATE

EDUCATIONAL PROGRAMMING
- March 19: CLE: Overview of Ninth Circuit appellate process
- July 2: Non-CLE: Appellate Court Tour
- Nov 5: CLE: Oral Argument: If You Fail to Prepare, You Prepare to Fail

NETWORKING & MENTORING EVENTS
- Monthly: Section Meeting – 4th Wed of every month
- Aug 13: Mixer @ Stone Liberty Station
- Dec 13: Annual Appellate Holiday Luncheon with Justice Kathryn Werdegar & Justice William Bedsworth
## COMMUNITY SERVICE
- None proposed

## BANKRUPTCY

### EDUCATIONAL PROGRAMMING
- Feb 27: CLE: BK Year in Review
- April 23: CLE: Ethics MCLE

### NETWORKING & MENTORING EVENTS
- None proposed

## EDUCATIONAL PROGRAMMING

### BUSINESS & CORP
- Jan 30: CLE: Intro to the CA Consumer Privacy Act
- March 18: CLE: Dynamex co-produced with Labor & Employment
- Oct. 4: CLE: HALF DAY CONFERENCE: Annual Corporate & LLC Update AND Annual Securities Law

### NETWORKING & MENTORING EVENTS
- April 18: Mixer with IP
- June 24: Mixer with Estate NLD
- Oct 29: Mixer with IP &
- Nov 4: Mixer with Civil and International in South Bay

### COMMUNITY SERVICE
- April 27: Beach Clean Up w/ Surfrider Foundation and co-produced with Real Property
- Sep 14: Beach Clean up w/ Family, Animal and NLD

## CIVIL

### EDUCATIONAL PROGRAMMING
- June 6: CLE: HALF-DAY CONFERENCE
- Nov 12: CLE: Successful Litigation in State and Federal Court (Offsite co-produced w/ Federal Bar Association)

### NETWORKING & MENTORING EVENTS
- Feb 12: Breakfast Roundtable

### COMMUNITY SERVICE
- None proposed

## CONSTRUCTION

### EDUCATIONAL PROGRAMMING
- April 5: Roundtable Breakfast
- June 28: CLE: Construction Law Update
- Sep 23: CLE: Women in Construction

### NETWORKING & MENTORING EVENTS:

### COMMUNITY SERVICE
- None proposed
ELDER

EDUCATIONAL PROGRAMMING
• None proposed

NETWORKING & MENTORING EVENTS
• Monthly: Brownbag Lunch Roundtable – 3rd Thurs of every month

COMMUNITY SERVICE
• None proposed

EMINENT DOMAIN
• No programs or events produced

ENTERTAINMENT & SPORTS

EDUCATIONAL PROGRAMMING
• August 29: CLE: Annual Beer & Wine Update
• Sept. 25: CLE: By SLA (and co-sponsored by the SDCBA) at Petco park. Topic: 5 Tool Performance: Success in Owning, Running, and Representing a Professional Sports Franchise

NETWORKING & MENTORING EVENTS
• None Proposed

COMMUNITY SERVICE
• None proposed

ENVIRONMENTAL

EDUCATIONAL PROGRAMMING
• April 9: CLE: Litigating California's Changing Coastline (co-producing w/ Real Property)
• July 17: Roundtable at Latham Watkins followed by Networking Reception
• Sept 20: CLE: Fundamental Friday - Do’s & Don't's from the Bench and Bar on Land Use Cases

NETWORKING & MENTORING EVENTS
• July 17: Networking reception at Latham Watkins

COMMUNITY SERVICE
• None proposed

ESTATE

EDUCATIONAL PROGRAMMING
• Mar 14: CLE: Estate Annual Case Update
• Aug 8: Roundtable: Probate Referee by PFAC (SDCBA sponsored in name only)
• Sept. 4: CLE: Topic: What Do I Do Now? How to Manage Death and Incapacity in Divorce Proceedings
• Nov. 6: CLE: Topic: Implementation of Final Health Care Decisions: Practical Advice for Attorneys

NETWORKING & MENTORING EVENTS
• June 24: Networking Mixer: Estate and Bus & Corp. Law Section

COMMUNITY SERVICE
• Oct 19: Annual Alzheimer’s San Diego Walk with PASD and PFAC.

NEW LAWYER DIVISION

EDUCATIONAL PROGRAMMING
• March 15: CLE: New Lawyer Nuts & Bolts – Mediation 101
• May 7: CLE: Cybersecurity & Social Media
• Aug 16: CLE: Fundamental Friday -Collaborative Justice Programs in San Diego (co-produced with Gov)
• Oct 25: CLE: Nuts & Bolts: Exploring Bias and Discrimination in the Workplace
- **NETWORKING & MENTORING EVENTS**
  - Feb 21: Game Night
  - Mar 21: Wine & Cheese Night
  - April 18: Sing & Shout
  - May 16: Hiking
  - June 20: Trivia Night
  - July 18: Dog Days of Summer Picnic
  - Aug 16: Summer Party
  - Sept. 19: Chili Cookoff
  - Oct 17: Halloween Costume Party
  - Oct 29: Speed Networking Mixer with Business & Corp & IP
  - Nov 21: NLF Friendsgiving Appetizer Potluck
  - Dec. 19: Ugly Holiday Sweater Party

**COMMUNITY SERVICE**
- None proposed

**FAMILY**

**EDUCATIONAL PROGRAMMING**
- March 11: CLE: Program #1 Client/Therapist Confidentiality (CAMFT/SDCBA)
- May 10: CLE: FULL DAY CONFERENCE: Hot Topics in Family Law
- June 10: CLE: Program #2 High conflict clients (CAMFT/SDCBA)
- Sept. 10: CLE: Program #3 Parental Alienation (CAMFT/SDCBA)
- Oct. 26: CLE: Preparing for and Litigating a Family Law Trial: Tips From the Bench

**NETWORKING & MENTORING EVENTS**
- None proposed

**COMMUNITY SERVICE**
- April 27: Beach cleanup with Real Prop. & Bus/Corp.
- May 30: Senior Lunch
- June 23: Burrito Boyz
- Aug 25: Burrito Boyz w/ Juvenile
- Sept 14: Beach clean up with Animal (through Coast keeper)
- 10/4/19: Senior Lunch
- 12/5/19: Senior Lunch

**GOVERNMENT**

**EDUCATIONAL PROGRAMMING**
- Aug 16: CLE: Collaborative Justice Programs in San Diego (co-produced with NLF)

**NETWORKING & MENTORING EVENTS**
- Feb 27: Speed Networking Event and Mixer
- June 13: Mixer @ Stone Liberty Station

**COMMUNITY SERVICE**
- None proposed
**IMMIGRATION**

**EDUCATIONAL PROGRAMMING**
- March 4: Roundtable re Border Crisis & Increasing Access to Justice (Teodora)
- March 20: CLE: Representing Asylum Seekers (Cases in Immigration Court by Teodora)
- Oct. 3: Roundtable: Migrant Protection Protocols, Leah Chavarria, Lauren Cusitello
- Nov. 1: N&B -CLE - USCIS District Director Updates; Alanna Ow (*Jill/Jason LRIS)

**NETWORKING & MENTORING EVENTS**
- Aug. 8: Mixer with Family, ADR, Juvenile at Rock Bottom (La Jolla)

**COMMUNITY SERVICE**
- None proposed

**INSURANCE**

**EDUCATIONAL PROGRAMMING**
- April 17: CLE: 2018 Year in Review

**NETWORKING & MENTORING EVENTS**
- Nov. 14: Insurance/Bad Faith Law Section Mixer & Recognition Event

**COMMUNITY SERVICE**
- None proposed

**INTERNATIONAL**

**EDUCATIONAL PROGRAMS**
- None

**NETWORKING & MENTORING EVENTS**
- Nov 5: Mixer with B&C and Civil Lit in South Bay

**COMMUNITY SERVICE**
- None proposed

**INTELLECTUAL PROPERTY**

**EDUCATIONAL PROGRAMMING**
- April 8: Roundtable: How to Get into IP (law students and new attorneys)
- Aug 26: CLE: The Budding Relationship Between IP Law and Cannabis

**NETWORKING & MENTORING EVENTS**
- Jan 10: Mixer (north county)
- April 16: Mixer with Business & Corp
- July 9: Mixer (downtown)
- Oct 29: Speed Networking Mixer with Business & Corp Section and NLD

**COMMUNITY SERVICE**

**JUVENILE**

**EDUCATIONAL PROGRAMMING**
- None

**NETWORKING & MENTORING EVENTS**
- Monthly (3rd Wed): Juvenile Section Book Club
- Aug. 8: Mixer with ADR, Family, Immigration at Rock Bottom (La Jolla)

**COMMUNITY SERVICE**
- Aug. 25: Burrito Boyz w/ Family law
- Sept. 14: Beach Clean Up
<table>
<thead>
<tr>
<th>LABOR &amp; EMPLOYMENT</th>
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<tbody>
<tr>
<td><strong>EDUCATIONAL PROGRAMMING</strong></td>
</tr>
<tr>
<td>• April 12th: CLE: 2019 Labor &amp; Employment Conference: Updates &amp; Hot Topics</td>
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<tr>
<td><strong>NETWORKING &amp; MENTORING EVENTS</strong></td>
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<tr>
<td>• Oct 22: When Mentee Met Mentor: Labor and Employment Speed Networking Mixer</td>
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<td><strong>COMMUNITY SERVICE</strong></td>
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<td>• None proposed</td>
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<tr>
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<tbody>
<tr>
<td><strong>EDUCATIONAL PROGRAMMING</strong></td>
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<td>• None proposed</td>
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<tr>
<td><strong>NETWORKING &amp; MENTORING EVENTS</strong></td>
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<tr>
<td>• June 17: Mixer with SCRA</td>
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<tr>
<td><strong>COMMUNITY SERVICE</strong></td>
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<tr>
<td>• June 28-30: Annual Stand Down (homeless veterans) event</td>
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<th>REAL PROPERTY</th>
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<tr>
<td><strong>EDUCATIONAL PROGRAMMING</strong></td>
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<tr>
<td>• Mar 28: CLE: Real Property Update</td>
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<td>• Apr 9: CLE: Coastal Land Use Conflicts (co-produced with Environmental)</td>
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<tr>
<td>• May 17: CLE: N&amp;B Real Property Tax Reassessment Issues and appeals process</td>
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<tr>
<td>• Sept. 27: CLE: Real Property Law Conference</td>
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<tr>
<td><strong>NETWORKING &amp; MENTORING EVENTS</strong></td>
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<tr>
<td>• Feb 1: Breakfast Roundtable (downtown)</td>
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<td>• April 17: Networking Mixer – Stone Brewing</td>
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<td>• June 20: Summer Soiree (produced by SDRA and co-sponsored by SDCBA &amp; CLA)</td>
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<tr>
<td><strong>COMMUNITY SERVICE</strong></td>
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<tr>
<td>• April 27: Beach Clean up with Business &amp; Corp</td>
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<tr>
<th>SOCIAL SECURITY DISABILITY</th>
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<td>• No programs or events produced</td>
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<th>TAX</th>
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<tbody>
<tr>
<td><strong>EDUCATIONAL PROGRAMMING</strong></td>
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<tr>
<td>• July 22: Roundtable: Careers in Tax Panel</td>
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<tr>
<td><strong>NETWORKING &amp; MENTORING EVENTS</strong></td>
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<tr>
<td>• June 17: Mixer at Stone Brewery</td>
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<td><strong>COMMUNITY SERVICE</strong></td>
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<td>• None proposed</td>
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<tr>
<td><strong>EDUCATIONAL PROGRAMMING</strong></td>
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<tr>
<td><strong>NETWORKING &amp; MENTORING EVENTS</strong></td>
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<tr>
<td>• June 12: Mixer – Gordon Biersch Brewery</td>
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<tr>
<td><strong>COMMUNITY SERVICE</strong></td>
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<td>• None proposed</td>
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Activities to Connect & Engage Members

**Social**
- Networking Mixers
- Informal Meet-ups

**Mentoring**
- Speed meet & greet
- Law school activities

**Community Service**
- Beach clean-up
- Serving seniors

**Education**
- CLE
- Non-CLE educational
- Roundtables

**Virtual**
- Listserve
- Filseshare
- Webpage
SDCBA ACTIVITIES: WHAT & HOW TO

1. CLE & Education
2. Networking & Mentoring
3. Community Service
4. Virtual

I. CLE AND EDUCATION:

1. TYPES OF PROGRAMMING

There are many different types of formats to consider when thinking about educational programming.

1. CLE
   a. Live and livestreaming (webcast)
   b. Webinar

2. NON-CLE EDUCATIONAL
   a. Roundtables

I. CLE

CLE programming is educational programming that is eligible for MCLE credit as regulated by the CA State Bar.

State Bar Regulations:

The State Bar of California regulates and defines what CLE is in our state. A program is eligible for CLE credit if it has significant and current professional or practical content. Presenters must have significant professional or academic experience related to the topic being presented and be balanced in their approach and presentation.

Per the State Bar of California, CLE programs that provide 1 or more hours of MCLE credit must include:

1) Biographies of the speakers;
2) An outline of the program;
3) Substantive handout materials
MCLE programs that offer less than 1 hour of credit do not require handout material, but must meet all other above requirements.

The SDCBA produces 2 types of CLE programs – live/live streaming and webinar.

a. **Live CLE (and Live Streamed/Webcast of the CLE)**

   Live CLE takes place at the Bar Center. Typically, these programs are also webcasted which is a live streaming of the program on the web in actual time to cast a wider net of attendees and allow members to watch the event from their home or office computer.

b. **Webinar**

   The webinar format is an internet based program – think of a GoToMeeting, where the participant dials in via code on the internet (and phone if they choose). This format allows for a speaker to present from his/her own location and is ideal for (1) out of town speakers who we want to bring in for our audience (i.e. a national expert), (2) when a speaker is unable to be physically present or (3) a new rule/court decision that was just passed. Participants see a visual aid (typically power point, other materials or head shots of the speakers) but they do not see a live shot of the speaker.

The SDCBA also produces programming where no CLE credit is offered:

**Non CLE Educational and Topical Roundtables**

Non-CLE educational programs are live programs that look and feel the same as a CLE without CLE credit and State Bar requirements.

Topical Roundtables are informal discussions that take place in a small group setting in order to provide maximum engagement for members. CLE credit is not provided and no materials are needed given the informality of the program. In these discussions, a moderator lays out a basic framework for discussion. This format is idea to bring together members to facilitate a networking opportunity via discussion, or to informally address a niche topic, new rule, decision or issues impacting the field of practice.

2. **COLLABORATION IN PRODUCTION OF PROGRAMING**

   We encourage co-production whenever possible for cross-over topics to cast a wider net of attendees and broaden the scope of the topic. Co-production can take place with any of our 26 Sections, our Committees, including our Legal Ethics Committee, and NLD, which is a community of law students and new lawyers in their first four full years of practice.

3. **CONTENT OF PROGRAMMING**

   With the multitude of CLE content available, we encourage you to take time to think about your practice area and be mindful of what is most relevant and engaging.
A. PROGRAMMING TOPICS THAT ARE MOST SUCCESSFUL AND WELL ATTENDED:
   a. Nuts & Bolts/101’s of new lawyers
   b. View/perspective from the Bench
   c. Year in Review/Annual Update of practice area
   d. Half-day and Full-day Conferences with facilitated networking

B. NEW LAWYER PROGRAMMING

Each section includes a thriving population of new lawyers. To address this important demographic, each section executive committee has a New Lawyer Member at Large in place to help identify programming and content that would be helpful to new lawyers and lawyers in the first 4 full years of practice. This includes our Friday Fundamental Series.

4. SPEAKER SELECTION & DIVERSITY OF PERSPECTIVE

Whenever possible, speakers should be members of the SDCBA. Additionally, speakers should be qualified and noted for their subject matter expertise. The SDCBA is committed to diversity in the profession and advancing awareness of diversity and inclusion. To meet this goal, the SDCBA has implemented a Diversity Speaker Policy that impacts any programs with 3 or more speakers. (POLICY ATTACHED)

5. LOCATION OF PROGRAMMING

A majority of the SDCBA’s educational programming takes place at the SDCBA to allow the content to be livestreamed and recorded. However, exceptions to this include programming that is intentionally held in other locations to address regional needs as not all SDCBA members work downtown. Please defer to your SDCBA internal team specialist who will work with you on the specifics.

6. EXTERNAL CO-SPONSORSHIP

Any requests to invite external organizations to co-sponsor programming needs to be approved by the SDCBA’s Executive Director. Please submit any requests for co-sponsorship when you are submitting your program to your program specialist.

7. HOW TO GET STARTED AND GET PROGRAM IDEAS APPROVED

STEP 1: DETERMINE THE TOPIC AND CONTENT OF THE PROGRAM

Things to consider:

- Topics should be relevant and engaging. Topics that are most successful:
  - Nuts & Bolts/101’s for new lawyers
  - View/perspective from the Bench
  - Year in Review/Annual Update of practice area
  - Programs that are half-day or more with facilitated networking
- Has this topic been overdone or recently done by another law related organization?
- Who is the intended audience? The entire membership? New attorneys? Certain sections?
• Can you collaborate with another Section and co-produce the program for the best content possible?

STEP 2: CONSIDER POSSIBLE SPEAKERS

Things to consider:

• Whenever possible, speakers should be members of the SDCBA.
• Speakers should be qualified and noted for their subject matter expertise.
• Speakers should be able to provide a broad and balanced approach to the presented content to allow for diversity of perspective.
• Programs with 3 more speakers must meet the Diversity Speaker Policy requirements.
• The SDCBA’s internal team is happy to help suggest speakers.

STEP 3: DETERMINE THE BEST FORMAT FOR THE PROGRAM

Things to consider:

• What is the best format for the content to be delivered to the audience?
• Is your speaker out of town?
• Is this a topic best handled by way of a discussion vs. a lecture?
• There are several options available:
  o **Live CLE/Live Streaming via Webcast** – in person panel of speaker(s) with a simultaneous streamlining of the live program to viewers at their home and office computer
  o **Webinar CLE** – internet based program with audio only and ideal for out of town speakers.
  o **Educational Non-CLE** – live programs that look and feel the same as a CLE without CLE credit and State Bar requirements.
  o **Roundtable** – informal discussion for a group of approx. 30 members.

STEP 4: DETERMINE WHEN YOU WOULD LIKE TO HAVE THE PROGRAM

Things to consider:

• Is the topic something that was newly passed in legislature and needs to happen right away?
• The SDCBA manages events and programs for 26 sections so it’s highly recommended to reserve a date as quickly as possible as our calendar fills up quickly.
• Be mindful of the time needed to develop and promote the program. At least 4-6 weeks of promotion is recommended to ensure your program is well marketed and attended.
STEP 5: SUBMIT YOUR SLATE OF ACTIVITIES TO YOUR INTERNAL TEAM MEMBER

All proposed programs and events, including networking mixers and socials, need to be submitted to your internal team member for review and approval by March.

Once reviewed, you will be contacted by your SDCBA specialist to walk you through the next steps to begin moving your program forward and provide you available dates.

NETWORKING & MENTORING EVENTS

A. Creating opportunities

Creating opportunities to network is an important part of what sections do. Members like to meet others in their practice area, and also network with others who could, one day, become a possible referral source. Multi-section socials/mixers are a great opportunity to do this. Socials do not need to involve drinking – in fact members have asked that sections consider opportunities to network that don’t involve alcohol but a healthier outlet. Socials to consider include coffee meet and greets, a standing breakfast or lunch, an after work happy hour, hike, or a community service project. We encourage you to think of different ways to provide opportunities for members to connect and meet each other in informal settings.

B. Location and geographic diversity:

A healthy percentage of members work in the following areas:
1. Coastal corridor from Point Loma to La Jolla,
2. Mid county corridor from Mission Valley to Carmel Valley/Del Mar,
3. Northern part of the county,
4. East county;
5. South bay

As a result, the SDCBA needs to be sure our social events are accessible to members wherever they office. Please defer to your SDCBA specialist who will work with you on the specifics.

COMMUNITY SERVICE

Section community service activities are a great way for members to connect and network in an informal setting. Each section executive committee has a member who is charged with being the Community Service point person. This point person will work with the SDCBA program specialist to identify opportunities for community service. Programs will be promoted not only to your section, but to the full organization through our upcoming Community Service/Pro Bono webpage.
VIRTUAL ENGAGEMENT (LISTSERVE, FILE SHARE & WEBPAGE)

Another way to address geographic diversity of our membership is virtually through listserves, the file share, and your webpage. All three are excellent resources to serve all members. All executive committees are encouraged to appoint an ex comm or other member to be sure there is vibrant and appropriate use of these resources.

PRICING

The SDCBA has a board approved program fee schedule. Upon scheduling your event, the program specialist will assign the appropriate registration fee. There is an add on-option for attendees to pre-purchase food at many events. Events are designed to be cost neutral, meaning that all hard costs including staff time, AV, food/beverage needs, printing materials, and any speaker fees must be recouped in the registration fee. To illustrate this: a 1 hour CLE with no speaker fee, would need a minimum of 20 registrants to be cost neutral.
SDBCA Diversity Panel Policy for Educational Programming

1. Statement of Purpose
   a. Initiatives that support inclusion are a significant part of the SDCBA’s work and mission. We are committed to promoting diversity in every aspect of our Association and creating a more inclusive legal community, including speaking opportunities in our educational programming. In order to meet the objectives of promoting inclusion and encouraging the full and equal participation of all members, the SDCBA expects all educational programming to have qualified speakers that also include diverse members of the legal community.
   b. The SDCBA provides support to leadership in identifying diverse speakers. This support may include, but is not limited to: maintaining a diverse speakers directory, consulting with the SDCBA’s Committee on Diversity & Inclusion (CDI), and connecting members with local diversity bar organizations and diversity bar leaders.

2. Diversity
   a. “Diversity” is an expansive and flexible concept meant to include groups under-represented in the legal community. This includes, but is not limited to people who have the below attributes or a combination of these attributes:
      i. Less than 5 years of legal practice;
      ii. Women;
      iii. People of color;
      iv. People who identify as LGBTQ+, and
      v. People with disabilities
   b. The SDCBA may rely on state or local demographics available to determine representational percentages,
   c. Those who choose to participate as part of the faculty for educational programming will be asked to voluntarily self-identify and will be provided with a statement explaining the purpose of data collection to enhance diversity and inclusion in the SDCBA. These individuals will be given the option to decline to provide this information. The reporting provided shall remain confidential and anonymous in its disaggregated form, but may be used in statistical analysis regarding diversity and inclusion in the SDCBA generally.

3. Policy
   a. This policy applies to all educational programming whose faculty consists of 3 or more panel participants, including the moderator:
      i. Programs with faculty of 3 or 4 panel participants, including the moderator, will require at least 1 diverse member;
      ii. Programs with faculty of 5 to 8 panel participants, including the moderator, will require at least 2 diverse members;
      iii. Programs with faculty of 9 to 12 panel participants, including the moderator, will require at least 3 diverse members;
      iv. Programs with faculty of 13 to 16 panel participants, including the moderator, will require at least 4 diverse members.
   b. An exception may be granted if it is determined by the SDCBA internal team that a good faith effort to include the requisite number of diverse members was made but was not attainable.
      i. If a panel does not comply, was not granted a good faith exception, and/or it is determined that there is conscious disregard of this policy, the SDCBA retains the right to cancel scheduled programming.
      ii. In making a determination as to whether reasonable and good faith effort has been made to comply with this policy, the totality of the circumstances will be considered,
including information regarding the available pipeline of qualified candidates and any other relevant information and anecdotal information.

c. Although not a requirement, the SDCBA aspires to achieve a ratio of 50% diversity of the total panel participation, including the moderator.

d. All reasonable effort will be made to ensure individuals who have a disability can access the program.

4. Year 2022 Diversity Requirement

a. Effective January 1, 2022, 3.a. will be deleted and the following language shall replace 3.a. above:

b. This policy applies to all CLE programs whose faculty consists of 3 or more panel participants, including the moderator:

   i. Programs with faculty of 3 panel participants, including the moderator, will require at least 1 diverse member;

   ii. Programs with faculty of 4 to 5 panel participants, including the moderator, will require at least 2 diverse members;

   iii. Programs with faculty of 6 to 7 panel participants, including the moderator, will require at least 3 diverse members;

   iv. Programs with faculty of 8 to 9 panel participants, including the moderator, will require at least 4 diverse members;

   v. Programs with faculty of 10 to 11 panel participants, including the moderator, will require at least 5 diverse members;

   vi. Programs with faculty of 11 to 12 panel participants, including the moderator, will require at least 6 diverse members;

   vii. Programs with faculty of 13 to 14 panel participants, including the moderator, will require at least 7 diverse members;

   viii. Programs with faculty of 15 to 16 panel participants, including the moderator, will require at least 8 diverse members.
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<th>PROPOSED ACTIVITY WORKSHEET</th>
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<tr>
<td><strong>Type of Activity:</strong></td>
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<tr>
<td>☐ Networking event</td>
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<td>☐ Community service event</td>
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<tr>
<td>☐ CLE program</td>
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<tr>
<td>☐ Non-CLE Educational</td>
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<tr>
<td>☐ Roundtable</td>
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<td><strong>Topic:</strong></td>
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<tr>
<td>☐ New Lawyer/Nuts &amp; Bolts</td>
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<td>☐ Technology</td>
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<td>☐ Law Practice Management</td>
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<tr>
<td>☐ Year in Review/Annual Update</td>
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<td>☐ View from the Bench</td>
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<td>☐ Other: __________________</td>
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<td><strong>Potential Speakers:</strong></td>
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| *All panels must meet the Diversity Panel Requirement effective Jan. 2019*
| Speaker 1: __________________ |
| Speaker 2: __________________ |
| Speaker 3: __________________ |
| Speaker 4: __________________ |
| **Possible Collaboration:**|
| ☐ Legal Ethics Committee (LEC) |
| ☐ Committee for Diversity and Inclusion (CDI) |
| ☐ New Lawyer Division (NLD) |
| ☐ Another Section(s): __________________ |
| ☐ Other: __________________ |
| **Preferred Time of Year:**|
| ☐ Quarter 1 (Jan – March)  |
| ☐ Quarter 2 (April – June) |
| ☐ Quarter 3 (July – Sept)  |
| ☐ Quarter 4 (Oct – Dec)    |
| **Special Notes & Considerations:** |
PROGRAM & EVENTS
FREQUENTLY ASKED QUESTIONS

Q 1. **HOW OFTEN SHOULD I BE PLANNING ACTIVITIES FOR MY SECTION?**
We recommend producing some type of activity once a quarter and varying the type of engagement opportunity provided. Please keep in mind we have limited calendar space and have not only 26 sections collectively planning events, but also bar-wide annual events that the SDCBA plans internally.

Q 2. **WHEN ARE THE PROPOSED SECTION ACTIVITIES DUE?**
As we have moved to an annual planning for all programs and events, all slated activities you would like to hold for the year are due by March 1st. Please keep in mind when planning that we need to open the program/event for registration at least 4 prior to the date of the program to effectively market for a successful turnout.

Q 3. **WHAT INFORMATION IS NEEDED TO SUBMIT OUR ACTIVITIES FOR THE YEAR?**
The SDCBA has a template you can use that includes the following information needed for your SDCBA specialist to be able to review and approve your program or event to move forward:

A. Type of activity
B. Topic
C. Potential speakers
D. Possible collaboration
E. Preferred quarter or moth and time (morning, lunch hour or evening)
F. Any special requests or considerations

Q 4. **HOW DO I SUBMIT MY ACTIVITIES**
All activities should be emailed to your assigned Program and Event Specialist and include the above information described in question 3 above.

Q 5. **HOW WILL I KNOW WHETHER MY PROGRAM OR EVENT IS APPROVED?**
Once all program submissions are provided, you will be notified within a week of submission and be provided up to 3 available dates that will be placed on hold for your proposed program or event. Your assigned Program & Event Specialist will then work closely with you on the next steps to move your program or event forward.

Q 6. **DO I CONTACT THE VENUE TO SET UP A MIXER OR SOCIAL EVENT?**
No, your assigned Program & Event Specialist will contact any requested venue to verify that they can comply with the SDCBA policies, as we unable to enter into any contract and/or meet a required food or beverage minimum. Internally, we have a list of venues in both downtown and north county that can accommodate our needs that we are happy to suggest.

Q 7. **WHAT FORMAT OPTIONS ARE AVAILABLE FOR AN EDUCATIONAL PROGRAM?**
a. **Live CLE**: in person panel of speaker(s) along with webcasting, which is a live web-stream of the CLE that can be viewed from your home or office computer.

b. **Webinar CLE**: internet based program with audio only and ideal for out of town speakers

c. **Educational Non-CLE**: live programs that look and feel the same as a CLE without CLE credit for those topics that do not meet the CA State Bar requirements to provide CLE (which includes marketing, branding, generating revenue and/or clients)

d. **Topical Roundtable**: informal discussion for a group of approx. 15-20 members on a topic of interest to the section.

**Q 8. WHAT IS THE DIFFERENCE BETWEEN CO-PRODUCED AND CO-SPONSORED?**

Co-production is when two or more sections or committees collaborate together to produce the content of the program or the event. A co-sponsor is an external entity that provides financial or marketing assistance. Any request to have a co-sponsor must be vetted by the SDCBA’s Executive Director and Director of Programs & Events. Please raise any sponsorship requests with your assigned Program & Event Specialist who will address internally.

**Q 9. HOW ARE PROGRAMS AND EVENTS PROMOTED?**

Everything except an informal meet up is a joint marketing effort between the group producing the program/event and the SDCBA staff. Meet Ups are marketed solely by the producing group. Please know that members like to hear directly from their respective chair vs. the SDCBA staff. Internally, programs and events are promoted through the following channels, based upon the event:

a. List-serves
b. SDCBA website and calendar
c. This Week at the Bar – our weekly e-publication
d. For the Record – our monthly e-publication for new attorneys in their first 4 full years of practice.
e. Social media

**Q 10. I NEED HELP - WHO SHOULD I CONTACT FOR MY PROGRAMS AND EVENTS?**

We are here to help you in every step of the process, ensure the program/event is a success, and do the heavy lifting so you don’t have to. Please contact our Program and Events Department:

- **Sarah Harris, Director of Programs and Events:** sharris@sdcba.org or 619-321-4112

- **Maribel, Program & Event Specialist:** msanchez@sdcba.org or 619.321.4118