

LARIMER COUNTY BAR ASSOCIATION SPRING TERM DAY MINUTES
FROM THE MARCH 3, 2023 MEETING

Held via Webex and in Person
Larimer County Justice Center, Jury Assembly Room
201 LaPorte Avenue, Fort Collins, Colorado

In Attendance:

Executive Committee Members: Rebekah Berry-Chaney (President); Heidi Whitaker (Vice President), Andrew Priebe (Secretary).

Judiciary:

Chief Judge Blanco
Judge Ecton
Judge Ellison
Magistrate Majoros
Judge Villasenor
Judge Zehe
Judge Finley
Judge Lehman
Magistrate Jostad (retired)
Judge Dean
Judge Boxberger
Judge Lynch
Magistrate Schwartz
Judge McDonald
Judge Brinegar
Magistrate Esser

- 1. Call to Order and Introduction:** Bar President Rebekah Berry-Chaney called the meeting to order at 9:03a.m., and introduced the Executive Committee and Judges/Magistrates present.
- 2. State of the Judiciary** – Chief Judge Susan Blanco reports.
 - a. Judge Blanco welcomes Judge Zehe and Magistrate Schwartz.
 - b. Courtroom Assignments:
 - i. Judge Lammons has moved to a criminal docket and Judge Dean has moved to a civil docket, including domestic relations and dependency and neglect.
 - ii. Magistrate Schwartz will be in Courtroom 1A
 - iii. Magistrate Boxberger will be in courtroom 2A
 - iv. Magistrate Christiansen will be in courtroom 2B
 - v. Magistrate Esser and Magistrate Majoros will be splitting the dockets in courtrooms 1B and 1C
 - c. Lawyers teaching for change program is up and running (Women's Bar).
 - i. 3 hour volunteer commitment
 - ii. Volunteers will teach a class for 3rd, 4th and 5th graders about the legal field.
 - iii. Then students have a jury trial based on Sponge Bob
 - iv. There are already about 50 volunteers.
 - v. Judge Blanco requests additional volunteers
 - d. Warrant Clearance Event
 - i. First version was last fall at the public library.
 - ii. 75 people cleared over 100 warrants.

- iii. COVID vaccines and driver's licenses were provided.
- e. Opportunities:
 - i. Supreme Court Justice Hart will be joining us for Fall Term Day. At this event volunteers who meet certain requirements will be honored.
 - ii. Currently posting a position for court executive.
 - iii. Weekend bond hearings will be set in the 13th Jurisdiction. Funding has been provided and it is likely that 8th Judicial will be hosting these bond hearings in the future.
 - iv. Human Relations Award. Judiciary is helping to set this up all over the state, and the City of Fort Collins honored the judiciary with this award.
 - v. Judiciary will be hosting an event for past jurors in May.
- f. Numbers:
 - i. Numbers are lower than normal.
 - ii. Cases that are coming in are more complicated.
 - iii. Judge Blanco will provide numbers if requested.
 - iv. County Court and District Court are tied for the number of jury trials.

3. Introduction and Acknowledgement of Volunteers & Staff – Rebekah Berry-Chaney acknowledges and introduces specific volunteers and staff, including Cathy Vlasak (unpaid) and Gayle Kish (paid). Rebekah shows the members the new website that Gayle Kish has been working hard on. Please email info@larimerbar.org if Members want to post anything on the website (events, changes in firm, announcements, etc.), but there is a fee.

4. Update from the Bar:

- a. President Rebekah Berry-Chaney reported
 - i. LCBA has 557 members right now, which is good.
 - ii. In person events have been poorly attended, likely a remnant of the COVID pandemic. LCBA continues to find ways to encourage increases in in-person attendance.
- b. Treasurer's Report – Secretary Andrew Priebe reports for Treasurer Dan St. John
 - i. LCBA has substantial reserves. Currently the LCBA has just over \$245,000 in various accounts.
 - ii. Some CDs have expired or have too low of an interest rate. So, the LCBA will be reinvesting savings into staggered CDs to take advantage of higher interest rates and to allow for more flexibility with liquidity.
 - iii. Membership dues have been consistent with prior years. Some folks have taken advantage of our new LCBA only membership which was added in the recent revisions to the Bylaws.
 - iv. LCBA is currently on budget. As we close out the fiscal year there may be some line items that are under budget, and a few, mainly payroll related, may be over budget. Executive Committee will review this in June at the annual budget meeting and try to balance the budget.

5. Court Resource Center – Ian Bonner reported about the activities of the Court Resource Center.

- a. Court Resource Center helps pro se litigants with procedural based questions, not legal advice. Help people file out forms and understand court process. Goal is to make Courthouse less intimidating.
- b. Ian Bonner introduces Bailey, who is working part time for the Court Resource Center.
- c. Stats: Ian reported specific statistics of the people that were assisted both in person and remotely. Numbers are very good.
- d. Programs (QR codes are available for all volunteer opportunities):

- i. Monthly Ask A Lawyer program (Looking for volunteers, can sign up online, 2 hour commitment once per month)
 - 1. Held second Tuesday of every monthly, from 3-5pm. One domestic relations attorney and one civil attorney.
- ii. Law Day, April 28, 2023 (Looking for volunteers, can sign up online)
- iii. Latin X Task Force (Assist people in other languages). The numbers for this task force have gone up very quickly.

6. Access to Justice/Pro Bono Program – Magistrate Kandace Majoros and Samantha Walsh report.

- a.** Access to Justice (Magistrate Majoros reports):
 - i.** Thanks Ian Bonner and his team, and all other volunteers.
 - ii.** Family Law Day and Legal Resource Day are main programs
 - 1.** Looking for volunteers
 - iii.** Law Day for Older Adults (August 23, 2023 at Senior Center from 1-5pm)
 - 1.** Have 3 sessions, estate planning, Medicaid, Grandparent rights, etc.
 - 2.** Colorado Bureau of Investigation will report on scams that target older adults
 - 3.** Individual attorneys will meet with folks regarding estate planning
 - iv.** Access to Justice Committee wants to make more of an effort to honor volunteers. Justice Hart at Fall Term Day will honor volunteers that have meet the threshold of 50+ hours per year. There will also be a separate event to honor these volunteers.
 - v.** Colorado is looking into requiring Colorado attorneys to report their pro bono work, donations, etc. This would be done confidentially.
- b.** Pro Bono (Samantha Walsh reports):
 - i.** Samantha Walsh and Kara Clark are now co-chairs of the Pro Bono Program.
 - ii.** Thank you to Cody Knebel who served for many years.
 - iii.** Trying to find ways to increase volunteers. Because of COVID volunteers have decreased.
 - iv.** People can volunteer weekly, through weekly pro bono intakes at the courthouse (2.5 hour commitment)
 - 1.** There is also a Loveland intake.
 - v.** Volunteers can also be on a list for taking on pro bono cases. Can be limited representation.
 - vi.** Providing pro bono services may be a good way to serve the community and avoid burn out.
 - vii.** Setting up mentorship program. Attorneys would work with 3L law students on cases.

7. Trusts and Estates Committee - Rikke Liska reports

- a.** Pete Bullard is stepping down, and Rikke Liska and Kate Smith are taking over
- b.** Next meeting is March 29, 2023 (Regarding public administrator)
- c.** In June there will be a presentation about what to do with older documents
- d.** There will also be a presentation about how to pass on credit card fees to clients, which is now allowed
- e.** Reach out to Rikke if you would like to be added to the list.
- f.** 1 hour CLE for each meeting.
- g.** In-person or via zoom.

8. High School Mock Trial – David Ayraud reports

- a. 2023 Northern Colorado Regional High School Mock Trial Competition was held at Larimer County Justice Center on February 10-11, 2023. First time in 3 years that this was held in person.
- b. Mr. Ayraud reports that this competition provides an opportunity for high school students to practice trial advocacy.
- c. This was the first year that judges used electronic ballots, which worked great.
- d. 12 schools in the Northern Colorado area participated (about 150 students)
- e. 3 teams qualified for state:
 - i. 3rd Place - Pourde
 - ii. 2nd Place - Ridgeview
 - iii. 1st Place - Rocky Mountain High School
- f. Next year the Regional Competition will be held in Weld County on February 9 and 10, 2024.
- g. David Ayraud, Magistrate Linda Connors, and Sunita Sharma are going to transition out, and Sara Steiben will be taking over organization of Northern Colorado High School Mock Trial for Larimer County.
- h. As always, volunteers will be needed.

9. Professionalism Committee – Honorable John Jostad reports.

- a. It's a great day to be alive.
- b. Annual Professionalism Seminar will be held on April 19, 2023 at Lincoln Center (also available online)
- c. Many speakers will be present to discuss grievances, does and don'ts, etc.
- d. Looking for nominations for Professionalism Award.
- e. Some members of the Professionalism Committee have retired, so committee is looking for new members. Please contact Jennifer Rice if you would like to volunteer.

10. CLE Committee – Rebekah Berry-Chaney reports

- a. The CLE committee has started organizing exciting CLEs.
- b. Courtenay Patterson, Kevin Havelda and Julie Yates are current chairs.
- c. Several CLEs are scheduled, and noted on the LCBA website.

11. Board of Governors –Rebekah Berry-Chaney reports.

- a. Jennifer Rice, Kathryn Lonowski and Judge Renee Doak are chairs

12. Greater Colorado Law Student Experience Program – Rebekah Berry-Chaney reports

- a. A separate bank account has been opened, and the LCBA funds (\$4,000) have been deposited. This program is now fully funded. Members can donate to program.
- b. This program is up and running. 8 Week program.
- c. Reach out to Claire Havelda for more information

14. National Adoption Day – Heidi Whitaker reports

- a. National Adoption Day is likely scheduled for November 3, 2023. At this event, adoption proceedings take place all day in the courtroom and following each adoption proceeding, the child and his/her family & friends are invited to the Party Room to celebrate their special day with music, gifts for the children (goodie bags), entertainment, & photographs. Heidi will continue to try and get mascots and cheerleaders from Colorado sports teams.
- b. Looking for volunteers, and donations for children's goodie-bags
 - i. Steering committee volunteers (can be virtual or in person)
 - ii. Volunteers to gather items, goodies, donations, gifts, etc.

- iii. Volunteers to help with decoration
 - iv. Volunteers to help with shepherding children around courthouse.
- c. This is a great event, and results in big smiles all around the Larimer County Justice Center.
- d. Contact Heidi Whitaker for more information. heidi@burnhamlaw.com

15. Young Lawyers Division – Russ Conolly reports

- a. Russell Conolly is the new president of YLD.
- b. Happy hour will be held every month.
 - i. Next is March 30, 2023 at the Union.
- c. Please contact YLD if you are or know a new young lawyer.
- d. Law Day will be held on May 5, 2023 at the Justice Center. CLE Credit will be available.
 - i. CBA President will be presenting
- e. Summer Social will be held, details TBD.
- f. Reach out to Russell at russell@burnhamlaw.com with questions.

16. Inns of Court – Sam Kornfeld reports.

- a. Sam is the Treasurer of Byron White Inns of Court in Larimer County.
- b. Information about upcoming meetings will be circulated soon.

17. SJR Scholarship/Mentorship Program/Library – Ian McCargar reports

- a. Ian McCargar has retired from the practice of law
- b. Mentorship program.
 - i. Goal is to pair new lawyers with more experienced lawyers.
 - ii. Ian will be stepping down as chair of Mentorship Program, and is looking for someone to take on the role.
 - iii. Reach out to Ian if you are interested in mentoring, or are in need of a mentor.
- c. SJR Scholarship.
 - i. Currently has over \$100,000. Generates income every year, including through Ethics seminar each year is largely responsible for increasing this fund.
 - ii. Ian McCargar, Cam Banninga, and Will Beyers are committee members
 - 1. Ian will be stepping down, and is looking for someone to take over.
 - iii. Each Spring the SJR Scholarship Committee provides a \$2,500 scholarship to a deserving high school student interested in law.
- d. Library Committee meets every month on the first Tuesday of the month at 7am at Silver Grill in Old Town Fort Collins.
 - i. There is no library, and therefore Ian will remain chair of Library Committee.

18. Introduction of New Lawyers – Ian McCargar introduces the following new lawyers:

- a. Mark Martin – Massey, Mitchell & Kelly, PLLC
 - i. Admitted to practice on Halloween Day, 2022. Dressed up as a lawyer.
 - ii. From Alabama.
- b. Heather Jarvis - City of Fort Collins
 - i. Worked in Wyoming legislature.
 - ii. Went to University of Wyoming, and the Vermont Law School.
- c. Chris Hayes - City of Fort Collins
 - i. From San Diego
 - ii. Undergraduate at Stanford, and Law School at University of San Diego
- d. Timms Fowler is new clerk for Judge Jouard, although Timms has been practicing for 30+ years.

19. Introduction/vote for new Executive Board

- a. The following nominations were made:
 - i. Heidi Whitaker – President;
 - ii. Dan St. John – Vice President;
 - iii. Andrew Priebe – Treasurer; and
 - iv. Jordan Wiswell – Secretary.
- b. No other nominations were made by the members.
- c. All members present voted for these new appointments and none voted against.
- d. New Executive Board is approved.
- e. Members thank Rebekah Berry-Chaney for her service. Heidi Whitaker provides a gift to Rebekah and thanks her for her service.

20. Term Day Activities – The following activities were announced:

- a. Lunch will start at 11:45am on March 3, 2023 at Block One.
- b. CLE at Block One will start at 12:30.
- c. Bowling will start at 2:00pm at Chippers Lanes on Horsetooth.

21. Adjournment – New President Heidi Whitaker adjured the meeting at 10:35am.

Andrew Priebe
Outgoing Secretary/Incoming Treasurer

LARIMER COUNTY BAR ASSOCIATION

FINANCIAL STATEMENTS

March 31, 2023

Larimer County Bar Association
Bank Account Balances
March 31, 2023

Regular Checking Account #1383167	\$	153,077.12
Legal Aid Checking Account #1383159	\$	3,280.34
GCLSE Scholarship Account #1383403	\$	4,000.00
Available Funds	\$	156,357.46

CD/Premium Investment Accounts:

Independent Financial #8047030	\$	71,095.48	
Independent Financial #3002258 04/02/23	\$	11,578.58	
Independent Financial #805038 **			
	\$	82,674.06	\$ 82,674.06
			<u>\$ 239,031.52</u>

Larimer County Bar Association
Statement of Financial Position
As of March 31, 2023

	Mar 31, 23
ASSETS	
Current Assets	
Checking/Savings	
1000 Certificates of Deposit	
1020 Independent Bank #3002258	11,578.58
Total 1000 Certificates of Deposit	11,578.58
1100 Independent Bank Checking	
1110 Premium Investment 8047030	71,095.48
1120 Pro Bono Account 3159	1,332.17
1130 Operating Account 3167	152,416.38
1140 GCLSE Internship 3403	4,000.00
Total 1100 Independent Bank Checking	228,844.03
Total Checking/Savings	240,422.61
Accounts Receivable	
1200 Accounts Receivable	80.00
Total Accounts Receivable	80.00
Other Current Assets	
1300 Other Current Assets	
1310 Artwork	1,475.00
Total 1300 Other Current Assets	1,475.00
Total Other Current Assets	1,475.00
Total Current Assets	241,977.61
TOTAL ASSETS	241,977.61
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	
Other Current Liabilities	
2500 Payroll Liabilities	
2510 941 Tax Payable-Employee	410.80
2515 941 Tax Payable-Employer	244.27
2520 Colorado Tax Payable	96.00
2525 FUTA Payable	48.06
2530 SUTA-CO Payable	66.55
2540 FAMILI-CO Payable	36.51
Total 2500 Payroll Liabilities	902.19
Total Other Current Liabilities	902.19
Total Current Liabilities	902.19
Total Liabilities	902.19
Equity	
3000 Opening Balance Equity	232,995.31
3200 Retained Earnings	2,357.93
Net Income	5,722.18
Total Equity	241,075.42
TOTAL LIABILITIES & EQUITY	241,977.61

Larimer County Bar Association
Statement of Activities Budget vs. Actual
July 2022 through March 2023

	Jul '22 - Mar 23	Budget	\$ Over Budget
Ordinary Income/Expense			
Income			
4150 Ethics Seminar	3,715.00	7,500.00	-3,785.00
4160 CLE Other Seminars	70.00	0.00	70.00
4200 Dues Income	43,195.00	42,500.00	695.00
4210 COLTAF - Pro Bono Grant	12,500.00	12,500.00	0.00
4300 Fall Term Day Income			
4310 Golf	1,888.00	1,888.00	0.00
4320 Dinner	2,140.00	1,650.00	490.00
Total 4300 Fall Term Day Income	4,028.00	3,538.00	490.00
4400 Spring Term Day Income			
4410 Bowling	555.00	750.00	-195.00
4420 Lunch	860.00	1,400.00	-540.00
Total 4400 Spring Term Day Income	1,535.00	2,150.00	-615.00
4450 Interest Income	89.73	200.00	-110.27
4500 Classified Ads	535.00	600.00	-65.00
4600 Lawyers and Littles Event	2,395.00	550.00	1,845.00
4700 National Adoption Day	20.00	0.00	20.00
4800 Mock Trial Funds	3,763.57	1,000.00	2,763.57
Total Income	71,846.30	70,538.00	1,308.30
Gross Profit	71,846.30	70,538.00	1,308.30
Expense			
5050 Donations			
5051 Scholarship Donation	0.00	4,500.00	-4,500.00
Total 5050 Donations	0.00	4,500.00	-4,500.00
5070 Miscellaneous	0.00	500.00	-500.00
5080 Advertising /Membership	0.00	500.00	-500.00
5090 Bench/Bar Luncheons	450.27	900.00	-449.73
5150 Mock Trial Regionals			
5150.01 LCBA Contribution	1,041.57	1,000.00	41.57
5151 Competition Expenses	4,666.66	0.00	4,666.66
5152 Registration Expenses	255.00	500.00	-245.00
Total 5150 Mock Trial Regionals	5,963.23	1,500.00	4,463.23
5160 Law Day Expenses	0.00	50.00	-50.00
5170 Young Lawyers Division	1,000.00	1,000.00	0.00
5200 Access to Justice			
5205 Advertising	0.00	100.00	-100.00
5210 Internet Access	1,370.31	1,900.00	-529.69
5230 Committee Lunches	497.04	800.00	-302.96
5240 Legal Resource Day	360.00	250.00	110.00
5245 Family Law Day	0.00	300.00	-300.00
Total 5200 Access to Justice	2,227.35	3,350.00	-1,122.65
5260 Payment Processing Fees	405.32	400.00	5.32
5300 Office Supplies/Postage	339.19	250.00	89.19
5350 Ethics Seminar Expense	1,929.93	3,000.00	-1,070.07
5450 CLE & Other Seminars	1,202.30	1,750.00	-547.70
5460 Zoom License	154.25	155.00	-0.75
5530 Lawyers & Littles Expenses	2,935.67	3,745.00	-809.33
5540 National Adoption Day	200.00	1,000.00	-800.00
5550 Retreat Meeting	656.30	300.00	356.30
5570 Veterans Assistance Clinic			
5571 Lunch	100.00	100.00	0.00
5572 Advertising	0.00	100.00	-100.00
Total 5570 Veterans Assistance Clinic	100.00	200.00	-100.00

Larimer County Bar Association
Statement of Activities Budget vs. Actual
July 2022 through March 2023

	Jul '22 - Mar 23	Budget	\$ Over Budget
5580 Internship Program	4,000.00	4,000.00	0.00
5600 Gifts, Memoriams	100.00	405.00	-305.00
5610 Website Expenses	1,604.00	2,000.00	-396.00
5640 Officers Liability	1,910.00	1,870.00	40.00
5650 Accounting -Tax Prep	0.00	675.00	-675.00
5700 Payroll Expenses			
5710 Salaries & Wages (OP)	3,415.50	6,336.00	-2,920.50
5711 Salaries & Wages (PB)	21,318.74	32,604.00	-11,285.26
5712 Employer SS & Medicare	1,915.52	3,470.00	-1,554.48
5713 FUTA	62.81	106.44	-43.63
5714 SUTA-CO	117.10	209.28	-92.18
Total 5700 Payroll Expenses	26,830.55	42,725.72	-15,895.17
5720 Computer Software			
5721 QuickBooks	300.00	175.00	125.00
5720 Computer Software - Other	90.00	120.00	-30.00
Total 5720 Computer Software	390.00	295.00	95.00
5730 Mileage Reimbursement	191.02	0.00	191.02
5740 Payroll Services (OP)	185.00	192.00	-7.00
5750 Worker's Compensation (OP)	0.00	200.00	-200.00
5900 Fall Term Day Expenses			
5910 Golf	2,272.12	2,300.00	-27.88
5920 Dinner	6,879.63	8,500.00	-1,620.37
5990 Other	371.64	300.00	71.64
Total 5900 Fall Term Day Expenses	9,523.39	11,100.00	-1,576.61
6000 Spring Term Day Expenses			
6010 Lunch	2,399.98	2,300.00	99.98
6020 Bowling	556.96	1,000.00	-443.04
6030 Other	98.95	300.00	-201.05
Total 6000 Spring Term Day Expenses	3,055.89	3,600.00	-544.11
6650 CO State Filing Fee	10.00	10.00	0.00
Pro Bono			
5820 Malpractice, Liability	0.00	2,788.00	-2,788.00
5840 Payroll Services	153.00	192.00	-39.00
5850 Cell Phone	168.26	230.00	-61.74
5860 Brochures, Supplies	0.00	400.00	-400.00
5870 Pro Bono - Internet	135.00	180.00	-45.00
5880 Worker's Compensation	206.00	200.00	6.00
Total Pro Bono	662.26	3,990.00	-3,327.74
Total Expense	66,204.12	94,162.72	-27,958.60
Net Ordinary Income	5,642.18	-23,624.72	29,266.90
Net Income	<u>5,642.18</u>	<u>-23,624.72</u>	<u>29,266.90</u>

4:40 PM

03/13/23

Accrual Basis

Larimer County Bar Association
Mock Trial 2023
January through February 2023

Type	Date	Num	Name	Memo	Debit	Credit	Balance
4800 Mock Trial Funds							
Deposit	02/21/2023	6958	Weld County Bar Association	Mock Trial Funds Received 2023		1,000.00	1,000.00
Deposit	02/21/2023	103705	Colorado Bar Association	Mock Trial Funds Received 2023		1,722.00	2,722.00
General Journal	02/21/2023	2023GK-01	Larimer County Bar Association	LCBA Contribution to Mock Trials 2023		1,000.00	3,722.00
General Journal	02/21/2023	2023GK-01	Larimer County Bar Association	Additional LCBA Contribution to Mock Trials 2023		41.57	3,763.57
Total 4800 Mock Trial Funds					0.00	3,763.57	3,763.57
5150 Mock Trial Regionals							
5151 Competition Expenses							
Check	02/08/2023	1739	Payton Buhler (v)	Reimb. Mock Trial Expenses	2,939.49		-2,939.49
Check	02/13/2023	1740	Sunita Sharma (v)	Reimb. Mock Trial Expenses	152.99		-3,092.48
Check	02/13/2023	1741	Hon. Linda Connors (v)	Reimb. Mock Trial Expenses	75.17		-3,167.65
Check	02/13/2023	1742	Payton Buhler (v)	Reimb. Mock Trial Expenses	197.40		-3,365.05
Check	02/13/2023	1743	Stacey Aurzada (v)	Reimb. Mock Trial Expenses	438.52		-3,803.57
Total 5151 Competition Expenses					3,803.57	0.00	-3,803.57
Total 5150 Mock Trial Regionals					3,803.57	0.00	-3,803.57
TOTAL					3,803.57	3,763.57	-40.00

Note: The contribution by the CBA was less than anticipated. Expenses were significantly more in 2023 than in 2022. I had the LCBA contribute an additional \$41.57 over the \$1,000 to help break even on this event. My recommendation is the WCBA contribute an additional \$40 to avoid a net loss by the LCBA.

Larimer County Bar Association
Ethics Seminar Income Year Comparison
February through May 2023

	Feb - May 23	Feb - May 22
Ordinary Income/Expense		
Income		
4150 Ethics Seminar	4,600.00	8,885.00
Total Income	4,600.00	8,885.00
Gross Profit	4,600.00	8,885.00
Net Ordinary Income	4,600.00	8,885.00
Net Income	4,600.00	8,885.00

Note: This report was run through May since the 2022 income was deposited on May 2, 2022. The 2023 income is as of April 7, 2023.