



HOUSING AND DEVELOPMENT LAW INSTITUTE
LIST SERVE POLICIES AND PROCEDURES
(Adopted by HDLI's Board of Directors on July 27, 2015)

The purpose of this electronic discussion list (List Serve) is to facilitate the exchange of ideas and general information for the benefit of the members of the Housing and Development Law Institute (HDLI). HDLI's Board of Directors has adopted the following policies and procedures for use of the List Serve. Subscription to the List Serve constitutes acceptance of, and agreement with, these policies and procedures. In addition to appearing on HDLI's website, these policies and procedures will be posted to the List Serve from time to time. HDLI, through its Board of Directors, reserves the right to amend these policies and procedures from time to time and will notify subscribers of any amendments by publishing the amendments on the List Serve. Please address any questions or comments regarding the List Serve to HDLI's CEO.

A. Posting Policies and Procedures

- 1) All postings (whether the initial inquiry or response) are the sole responsibility of the poster.
- 2) All postings must include a descriptive subject line in the posting. This allows other subscribers to determine whether they wish to open the posting.
- 3) All subscribers must use care in replying to postings. Any "Reply" will send the response to all subscribers to the List Serve. Many times a response is better suited to be communicated privately to the person posting the inquiry. Please respond only to the poster unless you believe that the information you will be sending would be of interest to a large portion of the List Serve subscribers. In order to respond exclusively to the poster, you must cut and paste his/her email address into a new message instead of replying to the list serve message.
- 4) Please remember that postings to the List Serve and all responses to them are not confidential, can be located on the internet and could be brought to attention in any proceeding in which the poster, his or her firm, or organization might be involved.

5) Subscribers to the List Serve are expected to maintain high qualities of professionalism, ethics, decorum and civility regarding postings. All postings should reflect the following:

- a) Good taste
- b) Appropriate language
- c) Brevity
- d) Ethical conduct pursuant to applicable rules

6) Requests for information.

a) Postings that request positive or negative information, about an individual, group or entity are permitted. However, if a response is negative in whole or in part, it should not be posted publicly, but rather communicated privately to the person posting the inquiry.

b) Responses to a request for names or recommendations of persons, groups or entities with expertise in a particular area or on a particular issue are permitted. However, any responses must be brief and simply indicate the identity of the recommended person, group or entity. Responses recommending or promoting the responder, his or her firm or organization, or any other person affiliated with the responder's firm or organization, must not be posted to the List Serve generally, but rather communicated privately to the person posting the inquiry. (See Section 7(g), below, Self-Promotion).

c) Responses to any requests contemplated by this section must be truthful and reliable and otherwise comply with these policies.

7) Prohibitions. Postings to the List Serve may not contain the following:

a) Anonymous postings

i) All postings must include the name and e-mail address of the poster as well as the name of that person's firm or organization and the city and state (or country if outside the U.S.) where the person is located. However, as an accommodation to subscribers, subscribers may request that HDLI post the inquiry on the subscriber's behalf.

HDLI takes no responsibility whatsoever for the content of any anonymous post that HDLI posts.

b) Social exchanges

i) Communications of a purely social nature should not be posted to the List Serve generally, but communicated privately.

c) Attachments

i) If attachments are available, they can be referred to in the posting or a link to them may be included in the posting. If a subscriber desires a copy, the subscriber should request that the attachment be sent directly to their individual e-mail address. A subscriber also may request that HDLI post the attachment on HDLI's website. If HDLI agrees to post, then HDLI will notify all subscribers of the attachment's location on the website.

d) Solicitations of funds or donations for any purpose other than a HDLI sponsored program or event, unless the solicitation is approved in advance by HDLI's CEO.

e) Political commentary, including:

i) Solicitation of votes for or against any candidate for elective office

ii) Solicitation of support/action for or against any legislative or administrative initiatives

(1) Purely informational and neutral postings on state or federal legislative activities are permitted. Responses to such postings must either be neutral or communicated privately to the person posting the inquiry.

f) Solicitation of client engagements

g) Self-promotion

i) Postings that promote the poster, his or her firm, or organization, or colleagues at the poster's firm or organization, including references to promotional literature, websites, clients, articles, speeches, publications, and/or that claim expertise in a particular area or issue are not permitted. The sole exception to this prohibition is a posting that announces a change of affiliation. Change of affiliation announcements should be brief and may not include self-promoting information such as areas of expertise or achievements of the poster or new colleagues. [See Section 6(b), above, Request for Information.]

h) Postings that violate HDLI's "Policy Regarding Self-Promotion and Conflicts at HDLI Events"

i) Copyright infringements

i) All postings must be free of copyright restrictions that limit distribution. For example, posting a significant amount of a copyrighted work verbatim requires the permission of the copyright holder. To verify that such permission was obtained, all postings of this nature must include a statement that this is the case.

j) Any of the following types of statements:

- i) Libelous
- ii) Defamatory
- iii) Obscene
- iv) Pornographic
- v) Threatening
- vi) Invasive of privacy
- vii) Invasive of the rights of publicity
- viii) Abusive
- ix) Illegal
- x) Generally objectionable
- xi) Constitute or encourage a criminal offense

- xii) Violate the rights of any individual, group or entity
- xiii) Create liability

8) Violations. HDLI has the authority to determine whether any posting complies with these Policies and Procedures, and to temporarily revoke a subscriber's List Serve privileges for a period of up to ninety (90) days for failure to adhere to these Policies and Procedures. HDLI also reserves the right to revoke a subscriber's List Serve privileges for more than ninety (90) days, or permanently, for failure to adhere to these Policies and Procedures. In this regard, it is recognized that some of these Policies and Procedures are subjective in nature. HDLI's Board of Directors will, therefore, be the final authority regarding interpretations of violations of these Policies and Procedures. Subscription to the List Serve constitutes a subscriber's agreement with HDLI's sole authority to revoke a subscriber's List Serve privileges at any time, in its sole discretion.

9) Use of Postings. HDLI retains the right to use posted materials in other formats.

B. Disclaimers.

The following disclaimers apply to all postings on the List Serve. Subscription to the List Serve by any individual, group or entity constitutes agreement with, and acceptance of, the following disclaimers:

- a) The opinions and views expressed on, and through, the List Serve are merely those of the poster and they do not reflect the views of HDLI, HDLI's board of directors or staff, or of any member of HDLI.
- b) No one can, or should, rely upon the information in postings on the List Serve as constituting legal advice.
- c) Posting and receiving messages on the List Serve does not, and shall not, create or constitute, an attorney-client relationship between the poster and any other individual, group or entity.
- d) The List Serve is provided by the Housing and Development Law Institute for the convenience of its members and guests. No representations or warranties whatsoever, express or implied, are given

as to the accuracy of the information posted to, or received from, the List Serve, or as to the continued availability of the List Serve.
e) Neither HDLI, nor any of its members, shall be liable for any failure of the List Serve, the contents of any posting, the exchange of any ideas or information on the List Serve, or for messages that are published on the List Serve.

C. Policy Regarding Self-Promotion and Conflicts at HDLI Events

1) HDLI has a continuing interest in being, and being viewed as, the preeminent industry group for the education of laws, regulations, legal decisions, and other authorities affecting the public and affordable housing industry in an environment that promotes full and equal participation by all interested persons, without favoring any particular individual, group or point of view. HDLI also recognizes its role in providing opportunities for individual networking at HDLI events in a way that (1) is not viewed as unduly intrusive by those in attendance; (2) does not allow any individual or group to exploit the group gathered together by HDLI; (3) does not make any attendee feel excluded; and (4) does not conflict with or detract from scheduled HDLI activities. Accordingly, it is the policy of HDLI that no individual, group, or entity engage in any type of self-promotion or otherwise schedule non-HDLI sponsored group meetings in connection with HDLI or HDLI-sponsored events (i.e., from the time the first event or program starts to the time the last event or program ends, in or near the city where HDLI event is taking place).

2) Examples of “self-promotion” activities HDLI will not permit include giving gifts; hosting group functions (i.e. more than six guests), such as meals, parties, sporting events; meetings or seminars; or displaying or distributing advertising, marketing materials, books, articles, case reports or anything of value. In planning future events and appointing members to positions of leadership, HDLI’s Board of Directors will consider compliance with this policy. In the final analysis, if a member has any question whether an event may be affected by this policy, HDLI asks that he or she make a written request to the CEO of HDLI.

(Effective July 27, 2015)