

**BLS SCHOLARS & FELLOWS RETENTION TASK FORCE**  
**Wednesday, January 25, 2023 @ 1-2 p.m.**  
**Renaissance Hotel – Room - Biscayne 3**

**Agenda**

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|------|---|-------------------|
| I.   | Call to Order and Welcome                                       | Stephen Sandiford |
| II.  | Approval of September 2, 2022 Meeting Minutes<br>(Attachment A) | Zach Hyman        |
| III. | Reminder – Mission Statement and Goals<br>(Attachment B)        | Judge McEwen      |
| IV.  | Discuss and Finalize New Survey for Assessment                  | Members           |
| V.   | Reimbursement Policy  | Judge McEwen      |
| VI.  | Other Matters for Discussion/Good Order                         | Members           |
| VII. | Adjourn   | Stephen Sandiford |

## ATTACHMENT A

### September 2, 2022 Meeting Minutes

#### Business Law Section Scholars/Retention Task Force Minutes From September 2, 2022 Meeting

1. Introduction
  - a. There was a discussion about the purpose of the task force, which was to assess why there has been a decrease in the retention and active participation in Scholars and Fellows in the Business Law Section.
  - b. Once the Task Force determines the cause of the issues, it will prepare a best practices report for the use of the Section.
  - c. The intent and Task Force will issue a survey to scholars and fellows and will begin the process of preparing a best practices guide to create consistency with the program.
2. Historical Overview – A recap of the Task Force’s efforts and findings.
  - a. Jim Moon provided a report of the efforts taken to create the task force, and the issues that were identified.
  - b. Marianne Dorris, the subsequent chair, clarified that one of the big factors identified was the cost of attendance, and that the task force had been engaged in discussions to alleviate the costs. Marianne also reported that there was confusion between the social mentor and substantive mentor with most time being spent with the social mentor.
3. Membership Committee Report:
  - a. Juan – Member has a line item of \$750 per student for the scholars program. There has been a challenge in getting law students involved and having law schools participate in the process.
  - b. In addition, there was a sentiment that the Scholars’ program was too brief in that it just provided a means to attend the labor day retreat.
  - c. There was also a lack of clarity with respect to the involvement.
4. IMF Committee Report
  - a. Kelly Roberts provided a report from IMF. She noted that the participation of fellows has increased as a result of the Fellows being notified of the need to be active or have their stipend be revoked. There has also been a greater effort to assign Fellows to substantive projects to ensure their involvement in the section.
  - b. Michelle Suarez, also clarified that having a consistent structure and accountability would be critical to the continued involvement of scholars.
  - c. IMF also was amenable to having fellows mentor scholars so long as the Fellows did not miss out on mentorship.
5. Call to Action.
  - a. The Task force discussed next steps and assigned responsibility with respect to such tasks.
    - i. The task force will be preparing and circulating a survey to get a better understanding of what is necessary for scholars, and volunteers were solicited.
    - ii. The task force identified the following barriers to continued involvement:
      1. Cost
      2. Mentorship/Involvement
      3. Recruitment

4. Jude Cooper, Juan Mendoza and Tom Zeichman, and Marianne Dorris volunteered to spearhead the effort to provide recommendations as to these issues.

## ATTACHMENT B

### **Mission Statement and Goals**

#### **Mission:**

- To **review and study** why the Section is not getting fellows/students to continue attendance after their fellowship year and after law school. (Source: Minutes from EC meeting Sept. 2017)
- 
- To **address the challenges** faced in retaining Fellows and Scholars. (Source: Minutes from EC meeting June 2018)

#### **Goals:**

- Initial:

The Task Force is studying and evaluating metrics in an attempt to identify why many of the Scholars and Fellows have chosen not to remain active in the Section and then to seek out ways to address those concerns. (Source: Minutes from EC meeting Sept. 2018)

- Revisit reasons for attrition
- Develop a "playbook" for combating attrition

#### **Creating New Survey Tool for Assessment:**

- Review/improve prior tool (Attachment B)
- Add open-ended questions (e.g., I wish I would have . . . ; I wish I had more opportunities to . . . ; I would have participated more if . . . ; I felt it was a waste of time to . . .).

#### **Creating Retention Best Practices Handbook**

- Sampling of general retention recommendation (Attachment C)
- Prior recommendations (Attachment D)
- Handbook outline in progress (Attachment E)
- Compliance tracking tool (Attachment F)

#### **Proposed Two-Year Horizon Benchmarks (Developing a timeline for obsolescence)**

- By Winter meeting 2023
  - Finalize survey tool
  - Obtain list of S/F alums from BLS admin
  - Furnish survey to S&F alums
- By Annual meeting 2023
  - Study survey results

- Address new survey findings in corresponding Handbook section/new section
- By Retreat 2023
  - Draft Handbook
  - Consider proposed revisions
  - Prepare template communications required by handbook
- By Winter meeting 2024
  - Prepare template compliance tracking checklist
  - Adopt final version of Handbook
- Annual meeting 2025
  - Congratulate the task force and recommend dissolution