

**BLS SCHOLARS & FELLOWS RETENTION TASK FORCE**  
**September 1, 2023 @ 2-3 p.m.**  
**Naples Ritz Carlton – Salon IV**

**Agenda**

- I. Introductions
- II. Approval of June 21, 2023, Minutes
- III. Review Mission, Goals, Achievements to date
  - a. Mission:
    - i. 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)
    - ii. To address the challenges faced in retaining Fellows and Scholars. (Source: Minutes from EC meeting June 2018)
  - b. Goals:
    - i. The Task Force is studying and evaluating metrics 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).
    - ii. Revisit reasons for attrition.
    - iii. Develop a "playbook" for combating attrition.
  - c. Achievements
    - i. Studied retention best practices materials
    - ii. Created survey tools
    - iii. Completed surveys of Scholars and Fellows with high response rates
    - iv. Created Style Guide
    - v. Created draft Handbook Outline
- IV. Observations re results of Scholars and Fellows survey.
- V. Handbook assignments, Style Guide adherence, benchmark dates.

- VI. Edit process: need an editor, deadline for submission to full task force for review.
- VII. Other business, general recs for Membership, IMF, or EC?
  - a. Should there be different “ringmasters” for Scholars and Fellows?
  - b. Other?
- VIII. Adjourn.

Attachments: June 2023 meeting minutes, Integrated Survey results, chairs' survey observations, sequencing plan, draft Handbook Outline, Style Guide.

## **BLS SCHOLARS & FELLOWS RETENTION TASK FORCE**

**Wednesday, June 21, 2023 @ 2-3 p.m.**

**Boca Raton Resort & Club – Amalfi Room**

### **Meeting Minutes**

The Scholars and Retention Task Force met on June 21, 2023, and we had a great turnout (around 20 people) and vibrant back and forth discussions. The Task Force has finalized the surveys to be sent to past and current Scholars and Fellows. We designed the surveys to be short, but at the same time they will elicit vital information that we hope will help us better understand the rationale why some Scholars and Fellows drift away from the Business Law Section. We will use the survey answers to inform us on what should be included in the Best Practices Handbook for Retention of Scholars and Fellows that we have committed to produce. We plan on circulating the survey links to past and current Scholars and Fellows around June 30th, after we receive further comments from members of the Task Force.

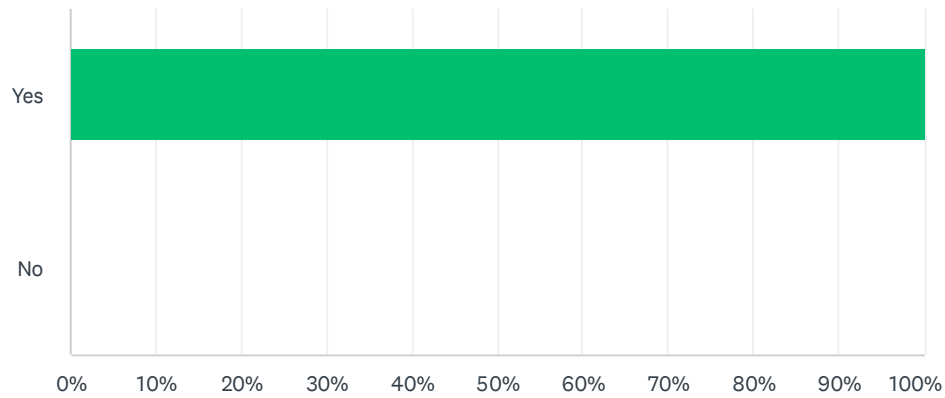
The Task Force recommended to the Executive Council that the BLS explore, to the extent possible, increasing the budget for Scholars to include up to an additional \$500 cash stipend per Scholar to attend the Labor Day Retreat or some other appropriate meeting, taking into account resources that may be available from the Scholars' respective law schools. (N.B.: This recommendation is slightly different from the one voted on by the Task Force based on the subsequent advice and counsel of BLS Chair Doug Bates.)

We believe that we are on track to meeting our deadline to produce the Handbook by next year's annual meeting and put ourselves out of a job.

The Task Force gave a shout-out to retiring Chair Stephen Sandiford, an elegant, measured, and calm person whom we thanked for his level-headed leadership.

## Q1 Are you currently a member of The Florida Bar?

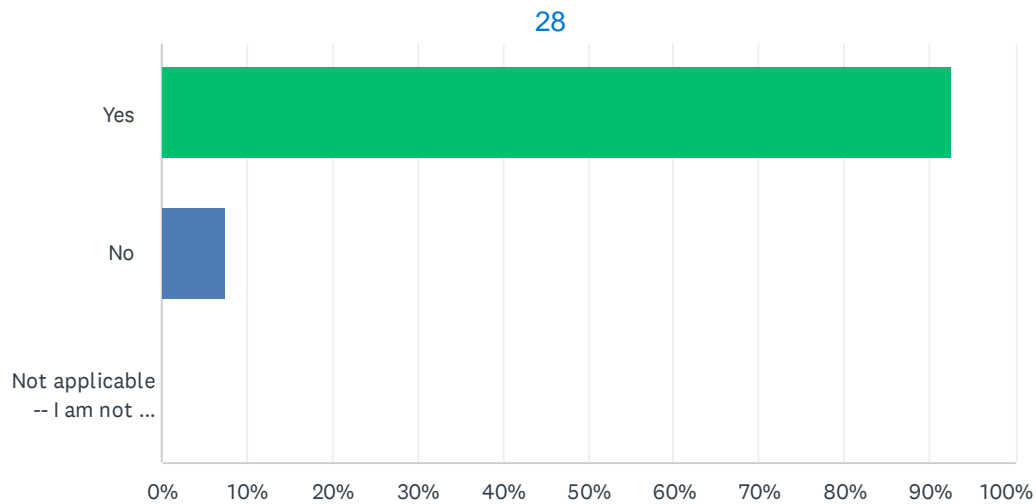
Answered: 27 Skipped: 0  
28



ANSWER CHOICES	RESPONSES		
Yes	100.00%	28	27
No	0.00%		0
TOTAL		28	27

## Q2 If you are a member of The Florida Bar, does your practice include any type of business law?

Answered: 27 Skipped: 0

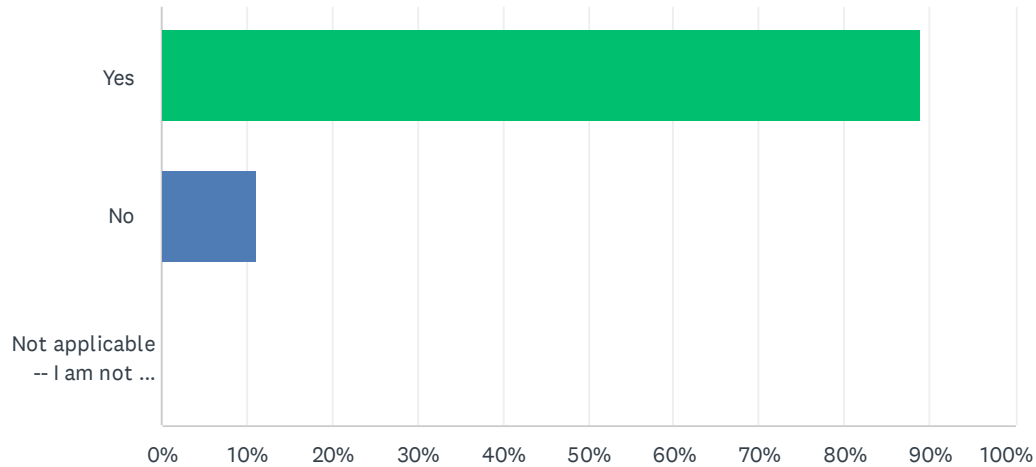


ANSWER CHOICES		RESPONSES		
Yes	92.86%	92.59%	26	25
No	7.14%	7.41%		2
Not applicable -- I am not a member of The Florida Bar.		0.00%		0
TOTAL			28	27

### Q3 If you are a member of The Florida Bar, are you currently a member of the Business Law Section (BLS)?

Answered: 27 Skipped: 0

28



ANSWER CHOICES		RESPONSES	
Yes	89.3%	88.89%	25 24
No	10.7%	11.11%	3
Not applicable -- I am not a member of The Florida Bar.		0.00%	0
TOTAL			28 27

Q4 If you are a member of The Florida Bar but are not a member of the BLS, why are you not a member of the BLS?

Answered: 5   Skipped: 22

23

## Q4 If you are a member of The Florida Bar but are not a member of the BLS, why are you not a member of the BLS?

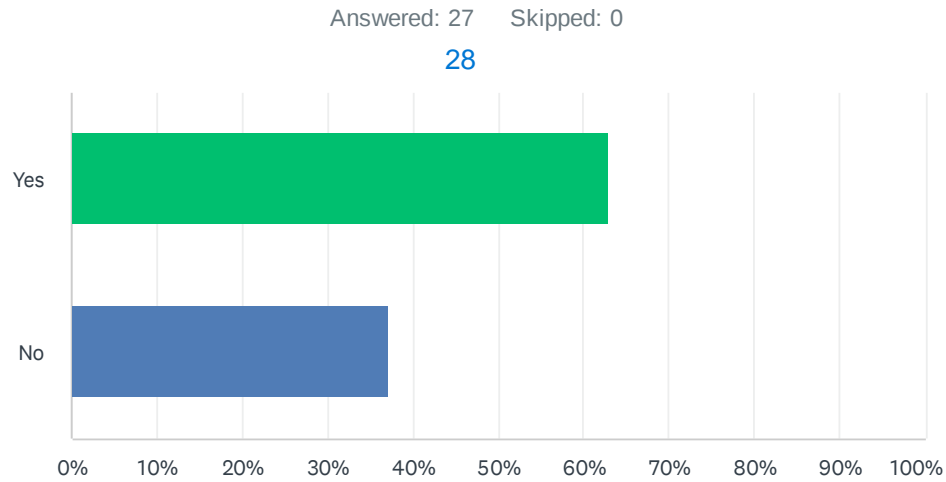
Answered: 5   Skipped: 22

23

#	RESPONSES	DATE
1	Cost	7/14/2023 3:50 PM
2	I am a member of the BLS.	7/13/2023 10:31 AM
3	N/A	7/12/2023 8:27 PM
4	N/A	7/7/2023 7:42 AM
5	Changed practice areas and do not practice Business law anymore.	7/6/2023 8:33 PM



## Q5 Were you assigned to a substantive committee of the BLS?

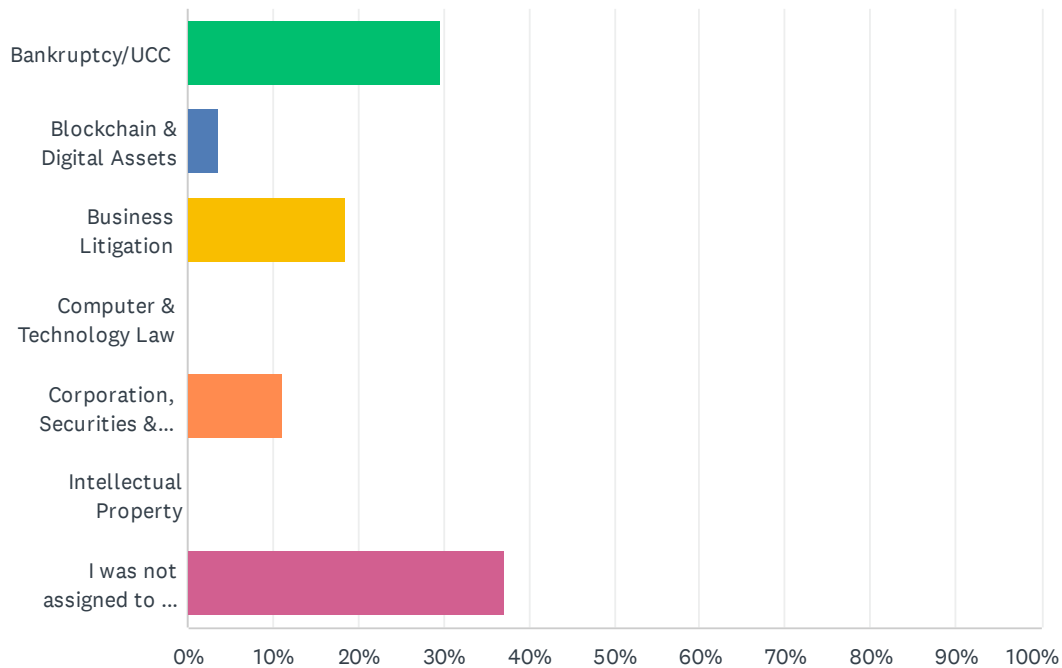


ANSWER CHOICES		RESPONSES	
Yes	64.29%	62.96%	18 17
No	35.71%	37.04%	10
TOTAL			28 27

## Q6 If you were assigned to a substantive committee, which one?

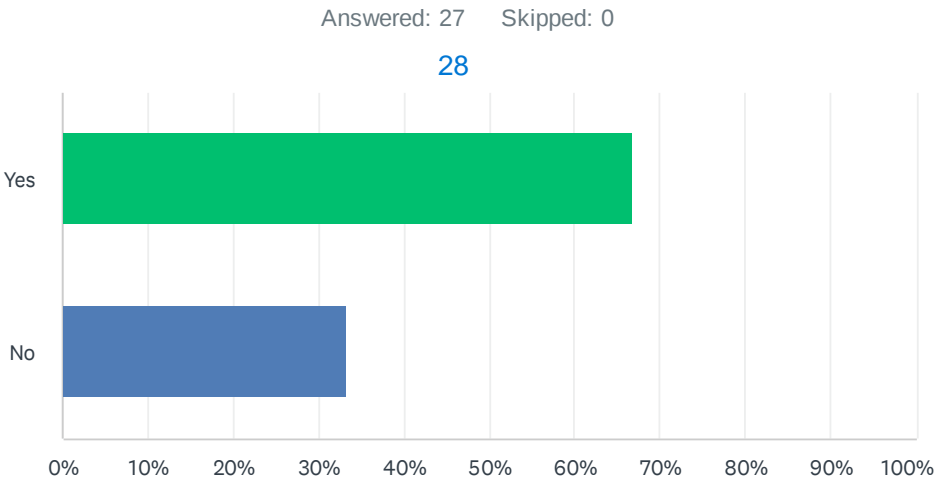
Answered: 27 Skipped: 0

28



ANSWER CHOICES		RESPONSES	
Bankruptcy/UCC	28.57%	29.63%	8
Blockchain & Digital Assets	3.5%	3.70%	1
Business Litigation	17.86%	18.52%	5
Computer & Technology Law		0.00%	0
Corporation, Securities & Fianancial Services	14.29%	11.11%	4 3
Intellectual Property		0.00%	0
I was not assigned to a substantive committee.	35.71%	37.04%	10
TOTAL			28 27

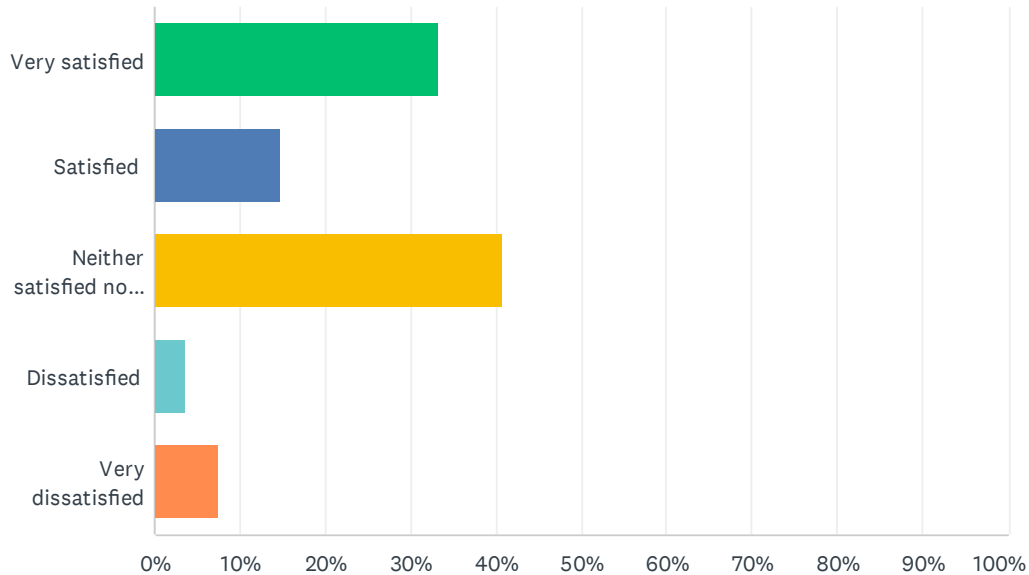
Q7 Were you assigned a mentor?



ANSWER CHOICES		RESPONSES	
Yes	67.86%	66.67%	19 18
No	32.14%	33.33%	9
TOTAL			28 27

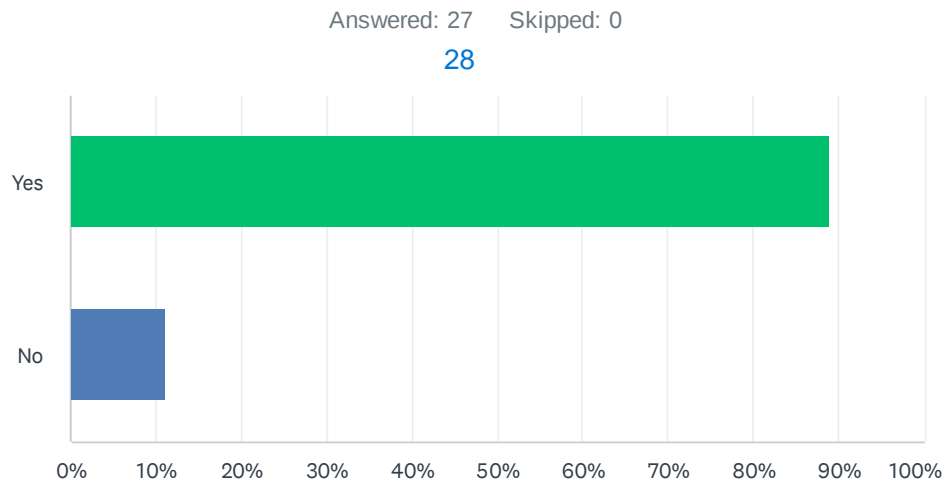
## Q8 Were you satisfied with your mentor's level of encouragement for you to participate in BLS activities?

Answered: 27 Skipped: 0  
28



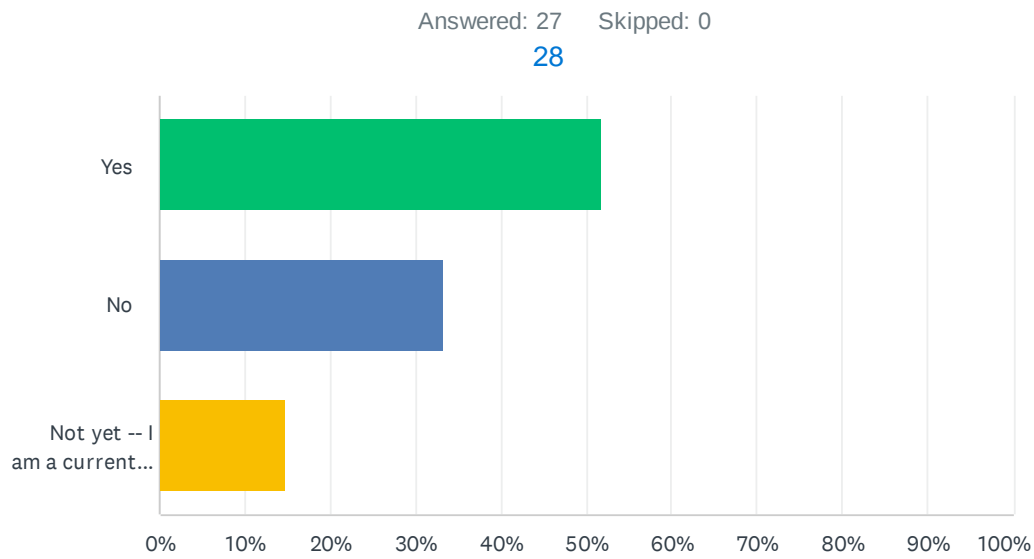
ANSWER CHOICES		RESPONSES	
Very satisfied	32.14%	33.33%	9
Satisfied	14.29%	14.81%	4
Neither satisfied nor dissatisfied	42.86%	40.74%	12 11
Dissatisfied	3.57%	3.70%	1
Very dissatisfied	7.14%	7.41%	2
TOTAL			28 27

## Q9 Were you satisfied with the level and accuracy of communication about the financial benefits of being a Fellow?



ANSWER CHOICES		RESPONSES	
Yes	85.71%	88.89%	24
No	14.29%	11.11%	4 3
TOTAL		28	27

## Q10 Did you fully consume your stipend during your term as a Fellow?



ANSWER CHOICES		RESPONSES	
Yes	50.00%	51.85%	14
No	35.71%	33.33%	10 9
Not yet -- I am a current Fellow.	14.29%	14.81%	4
TOTAL		28	27

Q11 If you are a past Fellow and did not fully consume your stipend during your term as a Fellow, why not?

Answered: 10 Skipped: 17

11

## Q11 If you are a past Fellow and did not fully consume your stipend during your term as a Fellow, why not?

Answered: 10 Skipped: 17

11

#	RESPONSES	DATE
1	In Year 2, I ended up utilizing my entire stipend. During Year 1, there was one meeting, the mid-year one, which had to be shifted to a virtual format due to an unexpected Covid surge. The previous class of Fellows experienced an entire year without any in-person meetings at all. One of the Fellows in that year informed me that BLS allowed the stipend to roll over for them. I was initially reassured by this information, thinking that if a meeting were to become virtual during my year, any remaining balance from the stipend would transfer. Additionally, the 2021 Annual meeting was also canceled for an in-person gathering, affecting my Fellow's class as well. Unfortunately, my class did not receive the same benefit as the previous one. As such, if BLS would consider allowing my remaining funds from Year 1 to be utilized for the Labor Day retreat, that would be truly fantastic. I'm happy and willing to work at the end. Thank you for considering this possibility. :)	7/15/2023 11:59 PM
2	The Labor Day retreat was cancelled and the annual retreat is in Boca Raton, where I live.	7/14/2023 2:46 PM
3	It was during Covid so no one was traveling. I actually did not consume any part of it.	7/12/2023 10:31 PM
4	Trial during annual meeting.	7/12/2023 8:40 PM
5	n/a (I am a current fellow)	7/12/2023 8:27 PM
6	Not sure if I fully consumed the stipend.	7/10/2023 10:47 AM
7	I was not able to attend some of the meetings due to work conflicts at the time.	7/7/2023 10:49 AM
8	I could not always get away (at the time I was with a large law firm) for the time required for each of the meetings.	7/7/2023 7:42 AM
9	My firm covered some costs. I didn't attend certain events due to personal-life conflicts. And COVID.	7/6/2023 10:43 PM
10	COVID (2020 was part of my fellowship term)	7/6/2023 9:12 PM

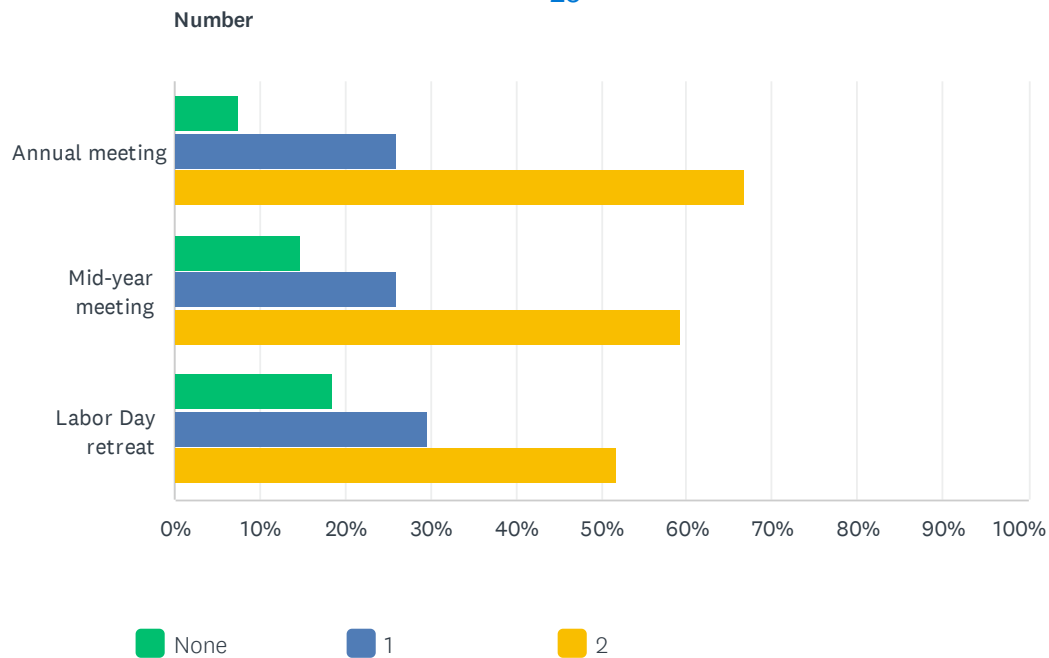
11 I could not attend a second event within that time frame (during Covid partly).



## Q12 When you were a Fellow, how many of each of the following BLS meetings did you attend?

Answered: 27 Skipped: 0

28

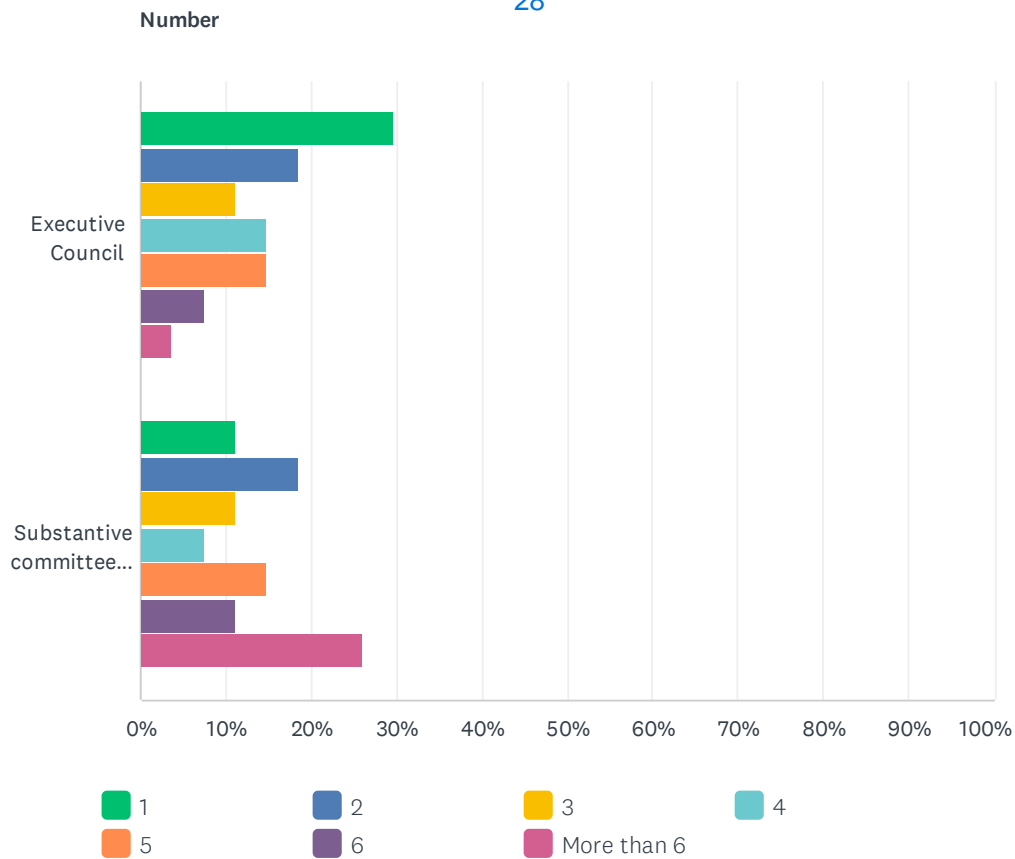


Number						
	NONE		1		2	
						TOTAL
Annual meeting	7.14%	7.41%	25.00%	25.93%	67.86%	66.67%
		2		7	19	18
						28 27
Mid-year meeting	14.29%	14.81%	25.00%	25.93%	60.71%	59.26%
		4		7	17	16
						28 27
Labor Day retreat	17.86%	18.52%	28.57%	29.63%	53.57%	51.85%
		5		8	15	14
						28 27

## Q13 When you were a Fellow, how many of the following specific types of BLS meetings did you attend?

Answered: 27 Skipped: 0

28

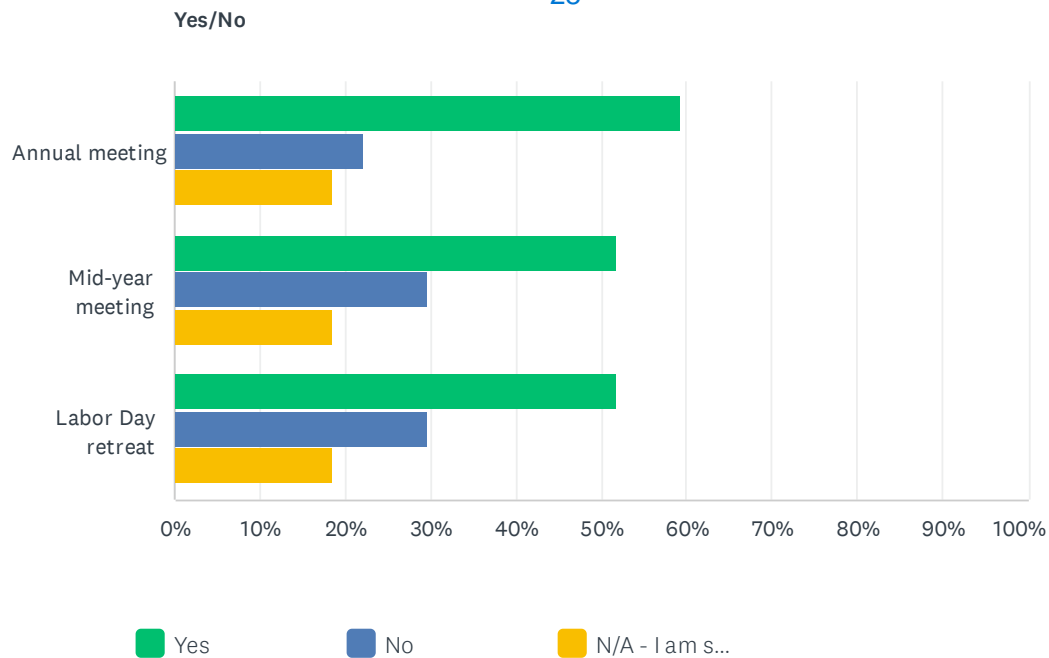


Number								
	1	2	3	4	5	6	MORE THAN 6	TOTAL
Executive Council	29.63% 28.57% 8	18.52% 17.86% 5	11.11% 10.71% 3	14.81% 14.29% 4	14.81% 14.29% 4	7.41% 10.71% 2	3.70% 3.57% 1	28 27
Substantive committee meeting	11.11% 10.71% 3	18.52% 17.86% 5	11.11% 10.71% 3	7.41% 7.14% 2	14.81% 14.29% 4	11.11% 10.71% 3	25.93% 28.57% 7	8 28 27

## Q14 Since your term as a Fellow ended, have you attended any of the following BLS meetings?

Answered: 27 Skipped: 0

28

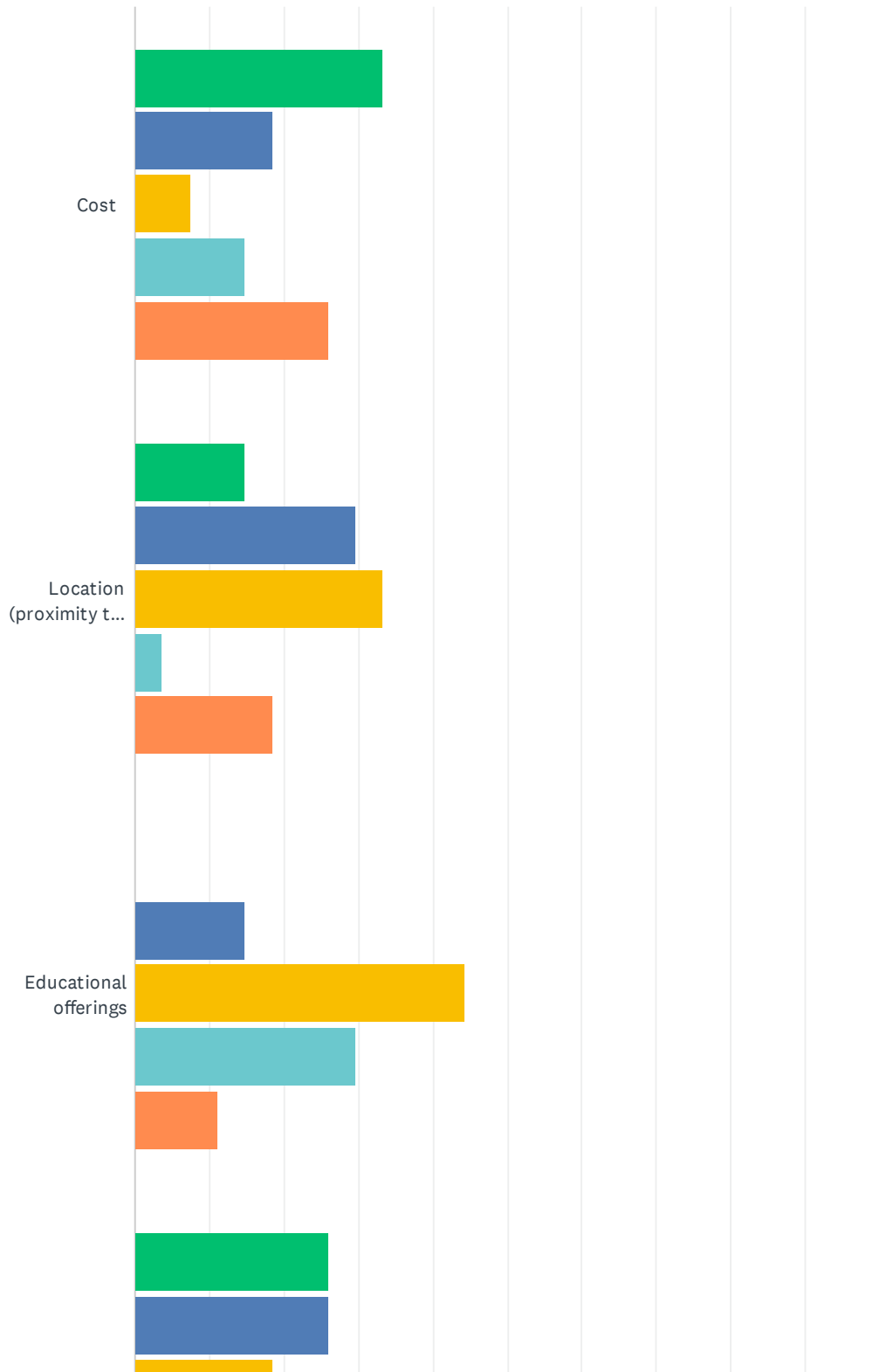


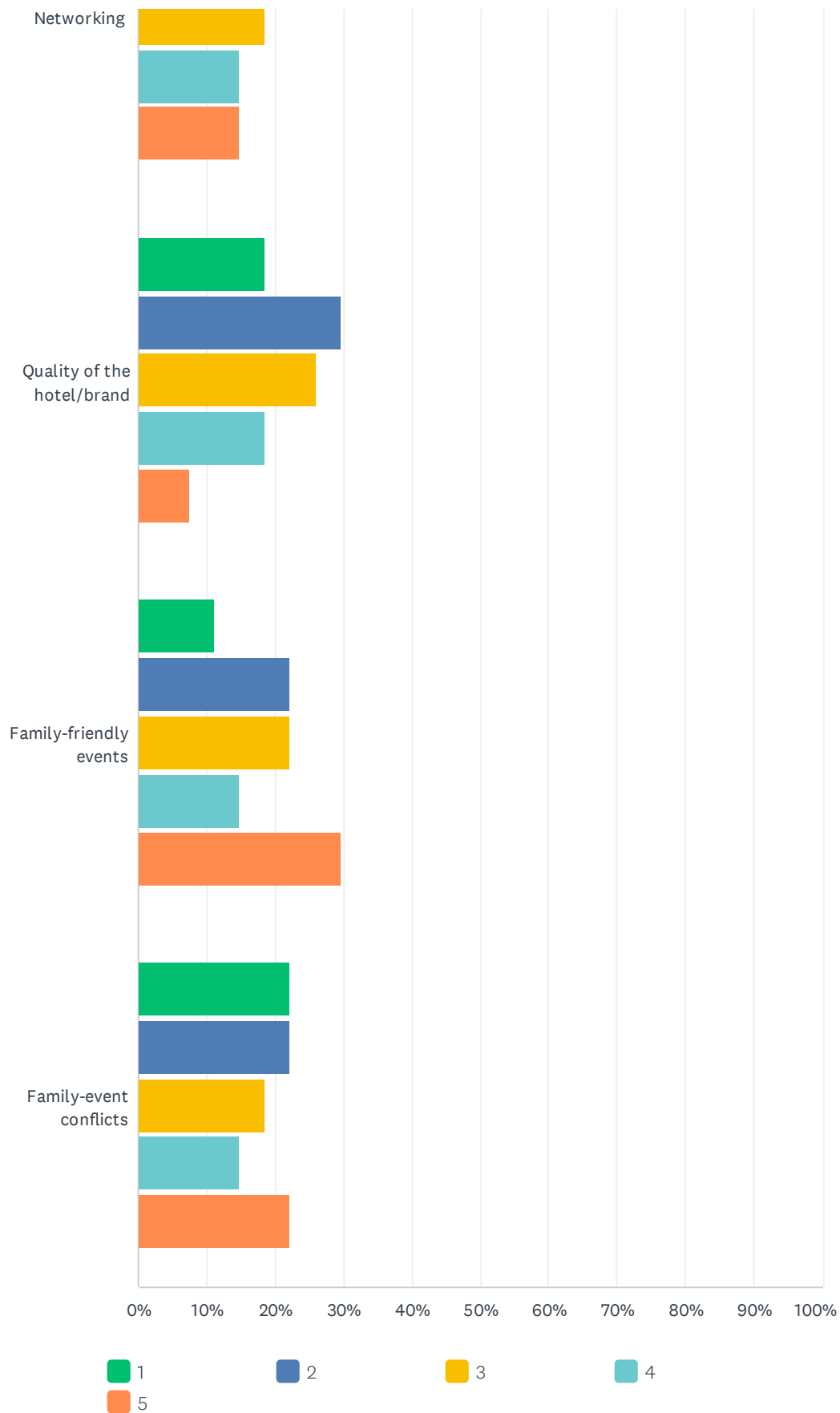
Yes/No							
	YES		NO		N/A - I AM STILL A FELLOW		TOTAL
Annual meeting	60.71%	59.26%	21.43%	22.22%	17.86%	18.52%	28 27
		17 16		6		5	
Mid-year meeting	53.57%	51.85%	28.57%	29.63%	17.86%	18.52%	28 27
		15 14		8		5	
Labor Day retreat	53.57%	51.85%	28.57%	29.63%	17.86%	18.52%	28 27
		15 14		8		5	

Q15 On a scale of 1-5, with 1 being the top rating, how important are the following factors in deciding whether to attend a BLS meeting in the future (i.e., if or once you are no longer a Fellow)?

Answered: 27 Skipped: 0

28

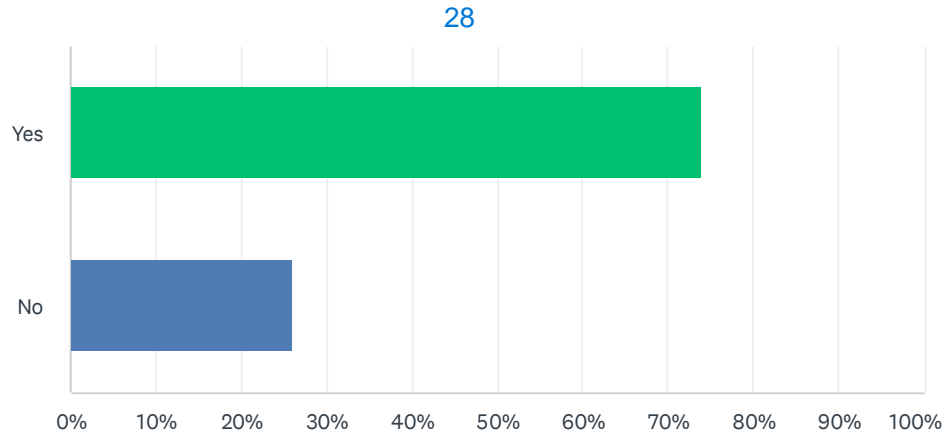




1+2=%	1	2	3	4	5	TOTAL	WEIGHTED AVERAGE	Rank
Cost 53.57%	33.33% 35.71% 10 9	18.52% 17.86% 5	7.41% 7.14% 2	14.81% 14.29% 4	25.93% 25.00% 7	27	28 3.25	3.19 2
Location (proximity to my location) 46.43%	14.81% 17.86% 5 4	29.63% 28.57% 8	33.33% 32.14% 9	3.70% 3.57% 1	18.52% 17.86% 5	27	28 3.25	3.19 2
Educational offerings 14.29%	0.00% 0	14.81% 14.29% 4	44.44% 42.86% 12	29.63% 28.57% 8	11.11% 14.29% 4 3	27	28 2.57	2.63 5
Networking 53.57%	25.93% 25.00% 7	25.93% 28.57% 8 7	18.52% 17.86% 5	14.81% 14.29% 4	14.81% 14.29% 4	27	28 3.36	3.33 1
Quality of the hotel/brand 46.43%	18.52% 17.86% 5	29.63% 28.57% 8	25.93% 25.00% 7	18.52% 17.86% 5	7.41% 10.71% 3 2	27	28 3.25	3.33 2
Family-friendly events 32.14%	11.11% 10.71% 3	22.22% 21.43% 6	22.22% 21.43% 6	14.81% 14.29% 4	29.63% 32.14% 9 8	27	28 2.64	2.70 4
Family-event conflicts 46.43%	22.22% 25.00% 7 6	22.22% 21.43% 6	18.52% 17.86% 5	14.81% 14.29% 4	22.22% 21.43% 6	27	28 3.14	3.07 3

**Q16 Are you aware that you can attend substantive BLS committee meetings without paying a registration fee or staying overnight for an entire annual meeting or separate BLS meeting?**

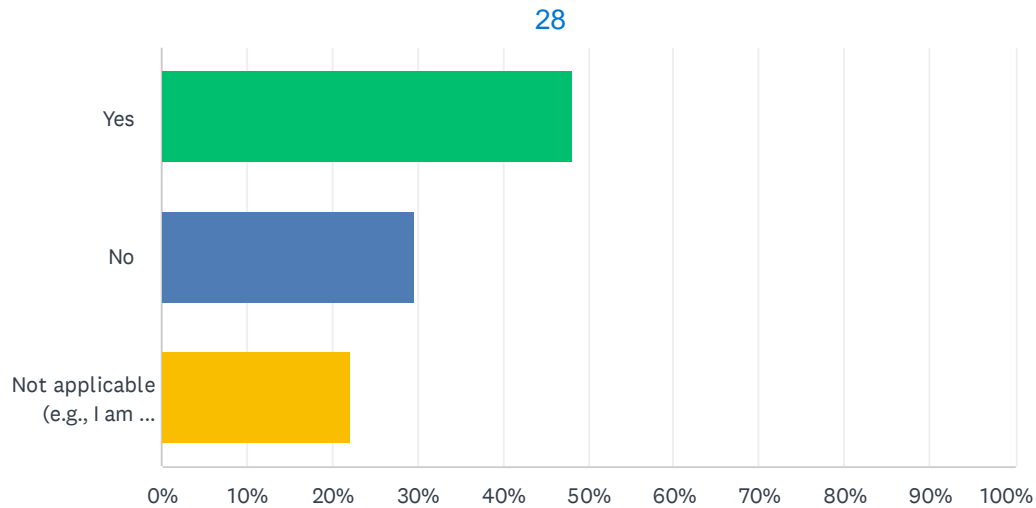
Answered: 27 Skipped: 0



ANSWER CHOICES		RESPONSES	
Yes	71.43%	74.07%	20
No	28.57%	25.93%	8 7
TOTAL			28 27

## Q17 Does your current employer provide financial support for you to attend BLS meetings?

Answered: 27 Skipped: 0



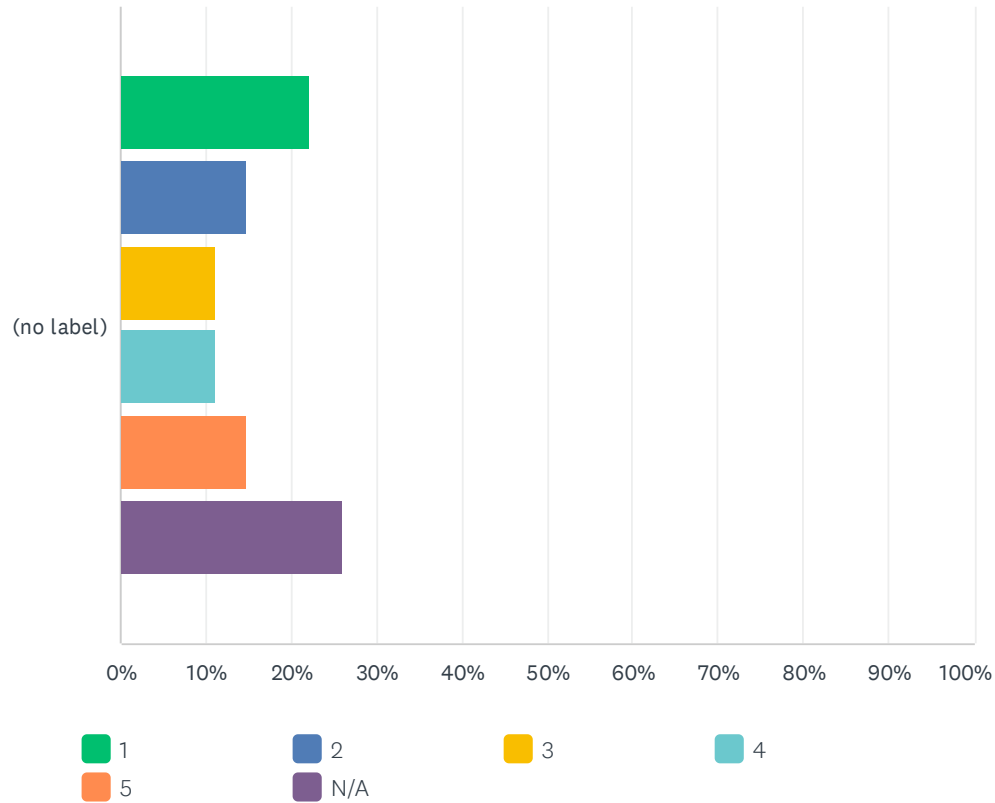
ANSWER CHOICES		RESPONSES	
Yes	46.43%	48.15%	13
No	32.14%	29.63%	9 8
Not applicable (e.g., I am a sole practitioner or not a member of the BLS).	21.43%	22.22%	6
TOTAL		28	27



## Q18 On a scale of 1-5, with 1 being the top rating, does your current employer encourage your participation in BLS activities?

Answered: 27 Skipped: 0

28

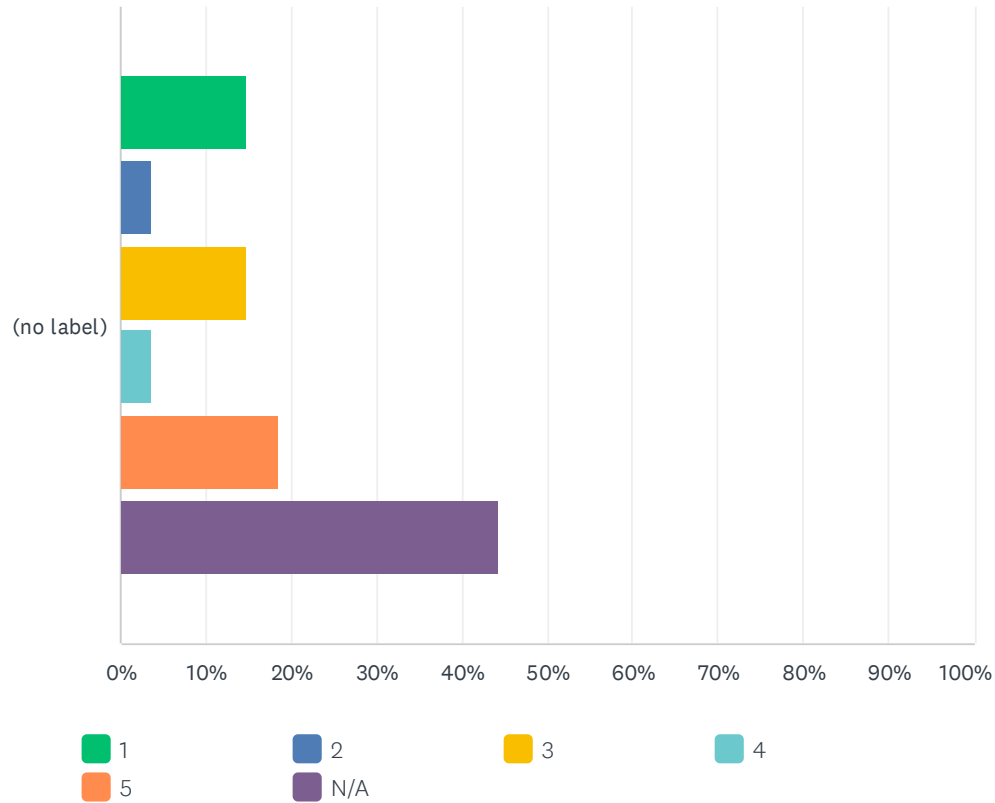


	1	2	3	4	5	N/A	TOTAL	WEIGHTED AVERAGE
(no label)	22.22%	14.81%	11.11%	11.11%	14.81%	25.93%		
	21.43% 6	14.29% 4	10.71% 3	10.71% 3	14.29% 4	28.57% 7	8	27 28
								2.32 2.41

## Q19 On a scale of 1-5, with 1 being the top rating, how effective was your involvement in the BLS in securing employment?

Answered: 27 Skipped: 0

28



	1	2	3	4	5	N/A	TOTAL	WEIGHTED AVERAGE
(no label)	14.81%	3.70%	14.81%	3.70%	18.52%	44.44%		
	14.29% 4	3.57% 1	14.29% 4	3.57% 1	17.86% 5	46.43% 12	13	1.54 1.59

Q20 During my term as a Fellow, I wish I had had more opportunities to . .

.

Answered: 11   Skipped: 16

12

## Q20 During my term as a Fellow, I wish I had had more opportunities to . .

Answered: 11 Skipped: 16

12

#	RESPONSES	DATE
1	Learn more about leadership in the section and network.	7/14/2023 3:50 PM
2	I wish there was more opportunities to showcase my practice and have direct conversations about how get clients.	7/14/2023 2:46 PM
3	Interact with mentors and benefit from mentoring - both social and substantive.	7/13/2023 10:31 AM
4	Meet in person. My tenure was during Covid and no one was traveling. I would have attended the retreat.	7/12/2023 10:31 PM
5	Go to local social events to network.	7/12/2023 8:40 PM
6	I think the Fellows program does an excellent job of providing an avenue for Fellows to pursue further involvement in the section. I found that if there was any event, committee, project, etc. I was provided the opportunity to participate as long as I proactively let someone know of my interest	7/12/2023 8:27 PM
7	Network and get one on one interactions with other members.	7/10/2023 10:58 PM
8	Find a mentor. I never had a mentor.	7/10/2023 10:47 AM
9	get involved long term with committees and meet more folks	7/7/2023 10:49 AM
10	Understand how leadership worked.	7/7/2023 7:42 AM
11	network with the BLS members who have been involved with the BLS for a long time (but in a small group setting, so that everyone can actually get to know each other - dinner etc.)	7/6/2023 8:28 PM

12 Receive training explaining how the BLS works and what the role of the various committees is.

## Q21 During my term as a Fellow, I would have participated more if . . .

Answered: 12   Skipped: 15

16

## Q21 During my term as a Fellow, I would have participated more if . . .

Answered: 12 Skipped: 15

16

#	RESPONSES	DATE
1	The biggest impediment was cost, which wasn't an issue as a Fellow.	7/14/2023 3:50 PM
2	My employer was more supportive of the time and opportunities that BLS provided. A significant portion of my work is Chapter 13 cases and my partners didn't think that BLS helped me network to our clients.	7/14/2023 2:46 PM
3	I participated the maximum amount possible.	7/13/2023 10:31 AM
4	I had more time to attend meetings in person. Even after Covid and things started to open up, most meetings are far from where I live/work. I can't time off from work to drive back and forth for the meetings, unfortunately. I would have to work really late to make up the hours.	7/12/2023 10:31 PM
5	I do not know if I would have increased my participation.	7/12/2023 8:27 PM
6	I participated in various things. I don't think i would have participated much more.	7/10/2023 10:58 PM
7	I had a mentor.	7/10/2023 10:47 AM
8	I didn't work for Foley & Lardner	7/7/2023 3:08 PM
9	I was more actively involved and provided projects/assignments for a committee	7/7/2023 10:49 AM
10	N/A - I participated regardless because that's just who I am.	7/7/2023 7:42 AM
11	Personal issues and COVID hadn't negatively impacted my involvement.	7/6/2023 10:43 PM
12	BLS members approached the fellows and tried to get to know them more (and get them involved in more projects). I didn't know many people, and it was hard to establish meaningful connections.	7/6/2023 8:28 PM

Q22 During my term as a Fellow, I felt it was a waste of time to . . .

Answered: 7   Skipped: 20

21

## Q22 During my term as a Fellow, I felt it was a waste of time to . . .

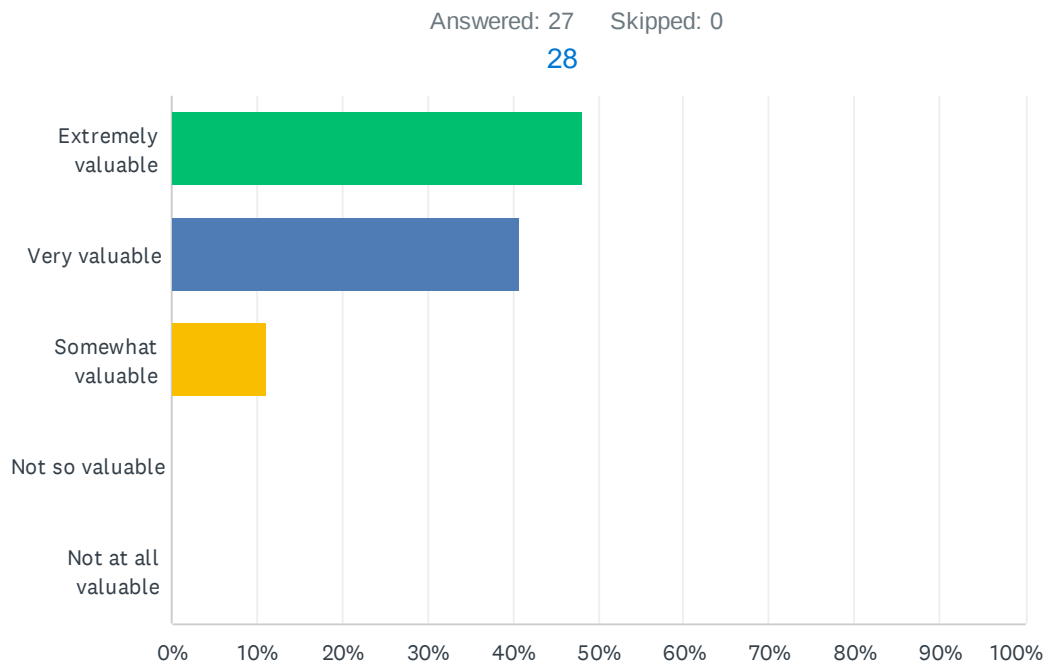
Answered: 7 Skipped: 20

21

#	RESPONSES	DATE
1	N/A	7/14/2023 3:50 PM
2	Attend CLEs.	7/14/2023 2:46 PM
3	I was never materially impacted by programming or other specific requirements of the program. A bit more regiment probably would have been beneficial. But, my experience was mostly free floating, wherein I could pick and choose types and amount of my involvement. As a result, there was not much (anything) that felt like a waste of time.	7/13/2023 10:31 AM
4	NA	7/12/2023 10:31 PM
5	The requirement to attend the full executive council meetings at all events was sometimes difficult	7/12/2023 8:27 PM
6	Go to every dinner w/ the other fellow. I think one is enough.	7/10/2023 10:47 AM
7	Be required to attend EC and substantive committee meetings (at least in the beginning) before I had any understanding of how the structure of BLS or leadership within BLS worked, or the work that BLS does on a legislative level.	7/7/2023 7:42 AM



## Q23 Please rate your overall experience as a Fellow.



ANSWER CHOICES	RESPONSES		
Extremely valuable	48.15%	46.43%	13
Very valuable	40.74%	42.86%	12 11
Somewhat valuable	11.11%	10.71%	3
Not so valuable	0.00%		0
Not at all valuable	0.00%		0
TOTAL			28 27

Q24 If you are receptive to discussing your answers with us, please disclose your email address.

Answered: 10   Skipped: 17

18

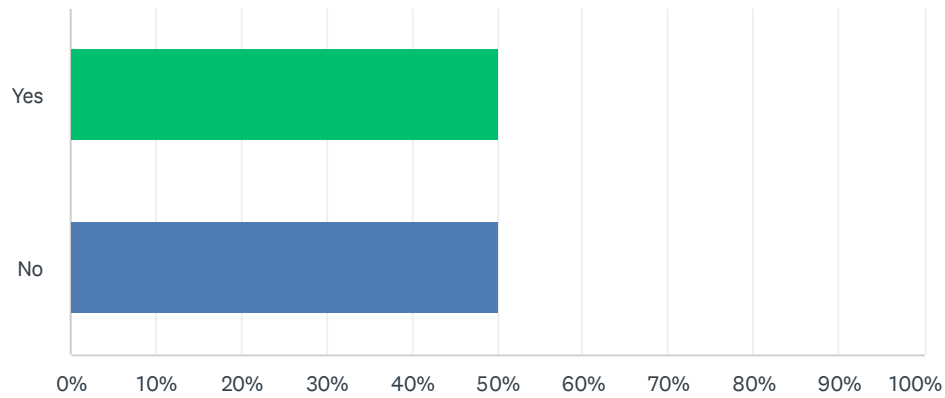
## Q24 If you are receptive to discussing your answers with us, please disclose your email address.

Answered: 10   Skipped: 17

#	RESPONSES	DATE
1	neginkord@gmail.com. I also participated in the IP Committee in addition to Blockchain.	7/15/2023 11:59 PM
2	Astone@tmppllc.com	7/14/2023 2:46 PM
3	cbroussard@shumaker.com	7/13/2023 10:31 AM
4	agilbert@underwoodmurray.com	7/12/2023 8:27 PM
5	jmendoza@sequorlaw.com	7/10/2023 10:58 PM
6	katherine@vandebogartlaw.com	7/10/2023 10:47 AM
7	MSuarez@FloridaEntrepreneurLaw.com	7/7/2023 7:42 AM
8	lstricker@shukerdorris.com	7/6/2023 10:43 PM
9	crystal@potts-legal.com	7/6/2023 9:12 PM
10	nicole.mclemore@us.dlapiper.com	7/6/2023 8:23 PM

## Q1 Are you currently a member of The Florida Bar?

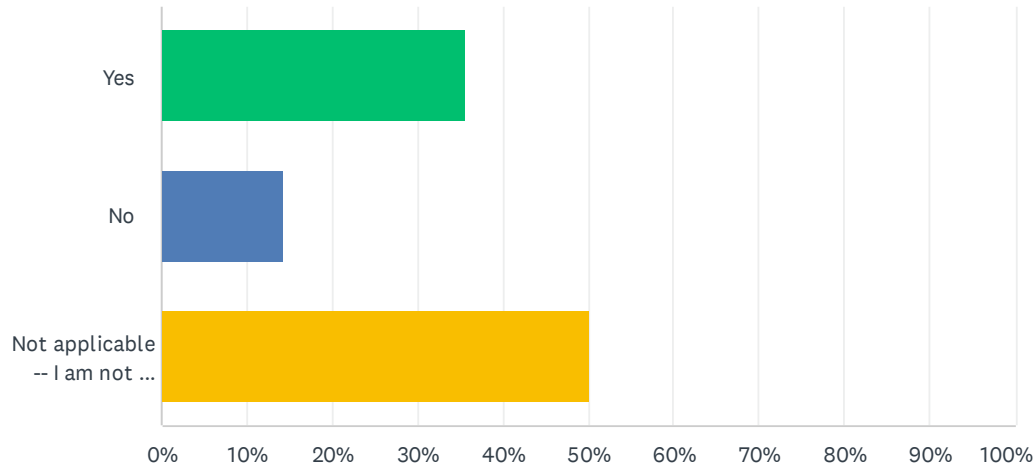
Answered: 14 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	50.00%	7
No	50.00%	7
TOTAL		14

## Q2 If you are a member of The Florida Bar, does your practice include any type of business law?

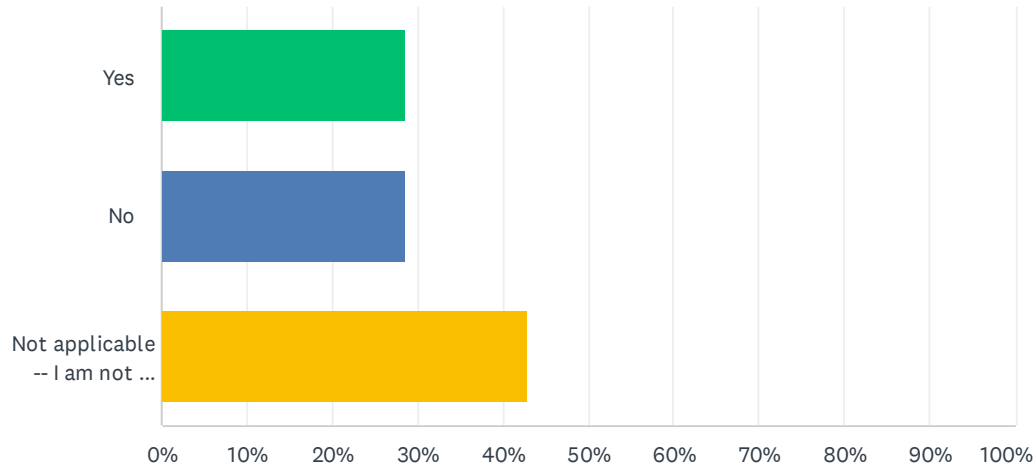
Answered: 14 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	35.71%	5
No	14.29%	2
Not applicable -- I am not a member of The Florida Bar.	50.00%	7
TOTAL		14

### Q3 If you are a member of The Florida Bar, are you currently a member of the Business Law Section (BLS)?

Answered: 14 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	28.57%	4
No	28.57%	4
Not applicable -- I am not a member of The Florida Bar.	42.86%	6
TOTAL		14

Q4 If you are a member of The Florida Bar but are not a member of the BLS, why are you not a member of the BLS?

Answered: 14 Skipped: 0

## Q4 If you are a member of The Florida Bar but are not a member of the BLS, why are you not a member of the BLS?

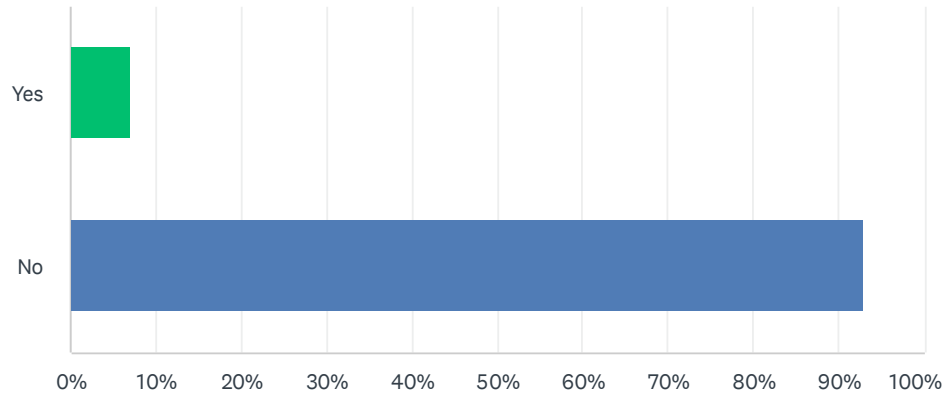
Answered: 14 Skipped: 0

#	RESPONSES	DATE
1	n/a	7/15/2023 11:01 PM
2	I am a member of the Massachusetts Bar.	7/13/2023 11:41 AM
3	N/A	7/12/2023 6:24 PM
4	Na	7/12/2023 6:22 PM
5	Not a member of fl bar yet	7/12/2023 6:19 PM
6	Not applicable, I hope to join The Florida Bar after I graduate from law school this year.	7/12/2023 5:50 PM
7	I now practice commercial real estate.	7/10/2023 4:19 PM
8	I am not currently practicing but working in a business/finance role.	7/10/2023 11:25 AM
9	N/A	7/10/2023 8:42 AM
10	Na	7/8/2023 2:16 PM
11	I practice insurance coverage law and don't see a lot of overlap in the BLS.	7/8/2023 8:00 AM
12	I have stepped back from specific sections because another lawyer and myself have recently started a new practice and at the moment we are evaluating the areas of law we want to emphasize.	7/7/2023 11:35 PM
13	NA but member of Texas Bar and Texas BLS	7/7/2023 9:10 PM
14	As a COVID generation graduate, I feel a little disconnected from joining sections	7/7/2023 8:53 PM



## Q5 Were you assigned to a substantive committee of the Business Law Section (BLS)?

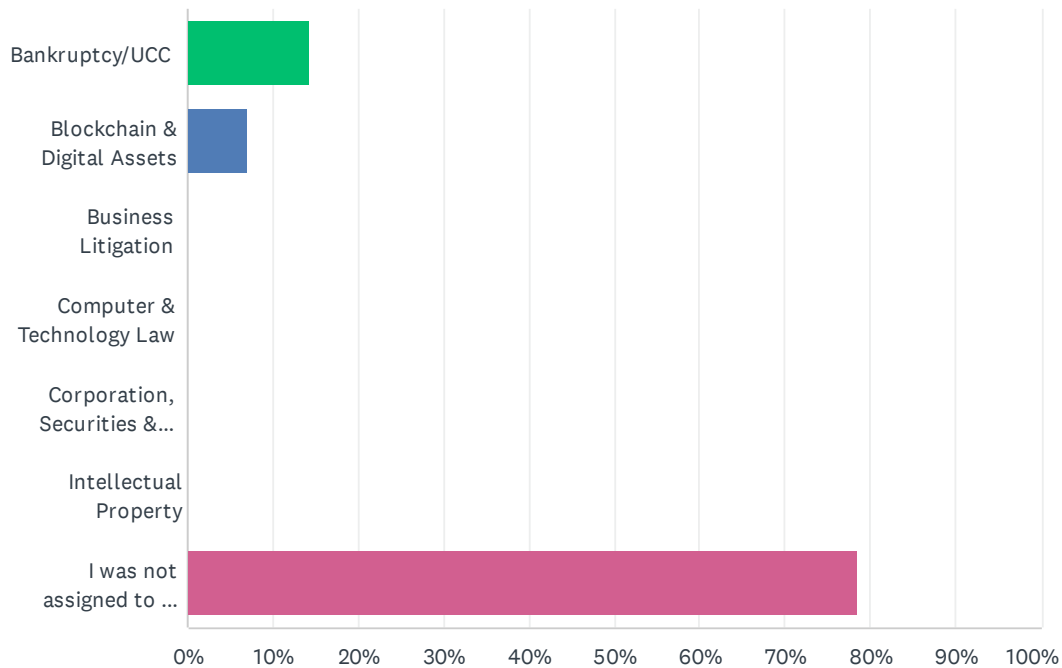
Answered: 14 Skipped: 0



ANSWER CHOICES		RESPONSES	
Yes		7.14%	1
No		92.86%	13
TOTAL			14

## Q6 If you were assigned to a substantive committee, which one?

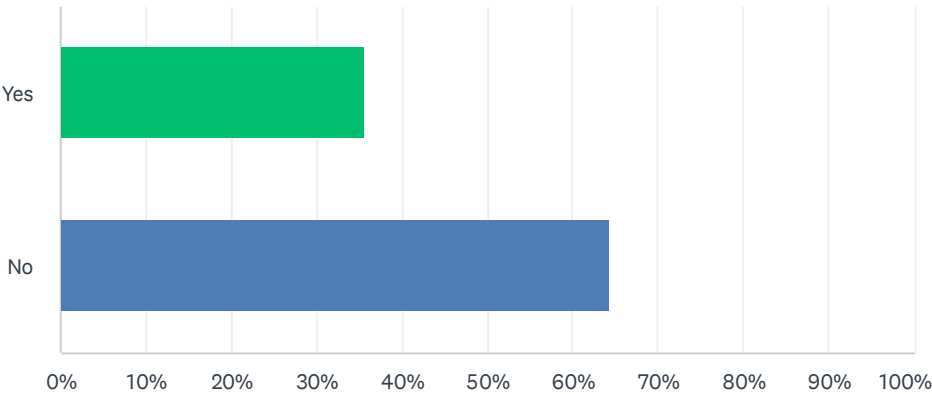
Answered: 14 Skipped: 0



ANSWER CHOICES	RESPONSES	
Bankruptcy/UCC	14.29%	2
Blockchain & Digital Assets	7.14%	1
Business Litigation	0.00%	0
Computer & Technology Law	0.00%	0
Corporation, Securities & Fianancial Services	0.00%	0
Intellectual Property	0.00%	0
I was not assigned to a substantive committee.	78.57%	11
TOTAL		14

Q7 Were you assigned a mentor?

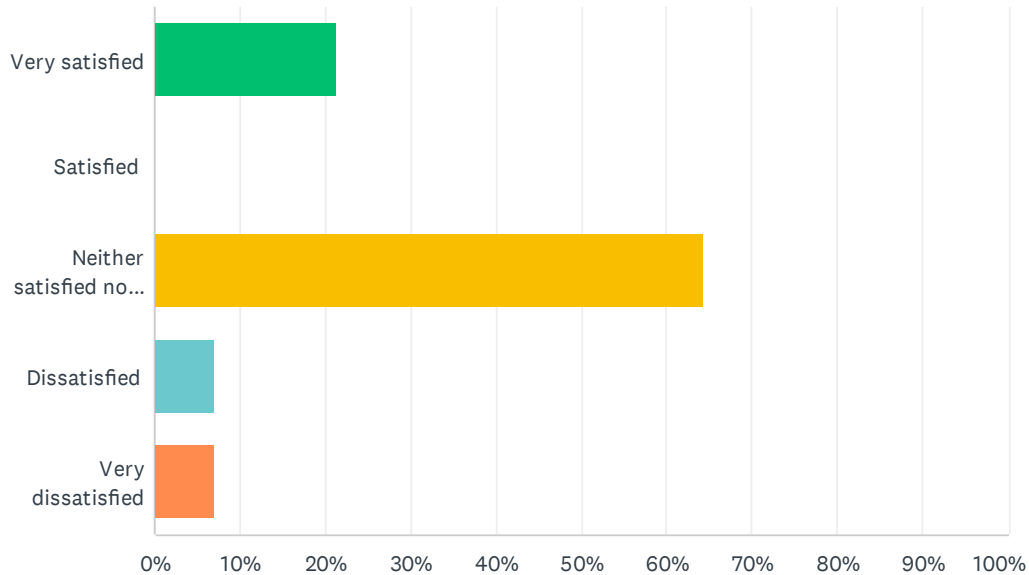
Answered: 14    Skipped: 0



ANSWER CHOICES		RESPONSES	
Yes		35.71%	5
No		64.29%	9
TOTAL			14

## Q8 Were you satisfied with your mentor's level of encouragement for you to participate in BLS activities?

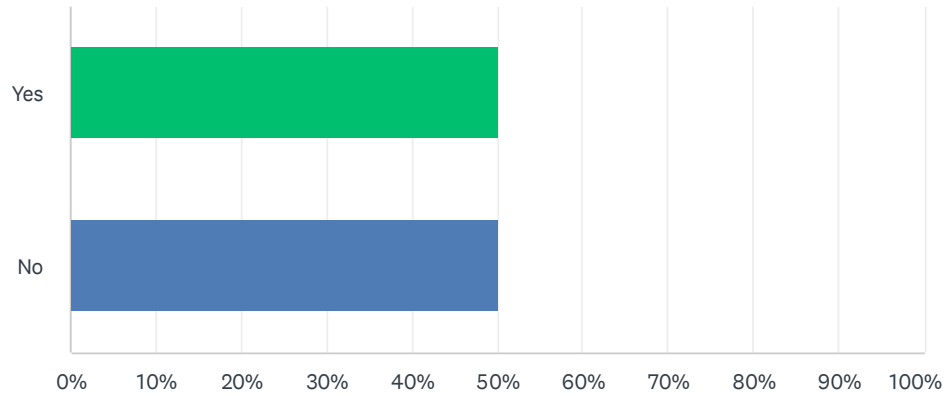
Answered: 14 Skipped: 0



ANSWER CHOICES	RESPONSES	
Very satisfied	21.43%	3
Satisfied	0.00%	0
Neither satisfied nor dissatisfied	64.29%	9
Dissatisfied	7.14%	1
Very dissatisfied	7.14%	1
TOTAL		14

## Q9 Were you satisfied with level of communication about and accuracy of the financial benefits of being a Scholar?

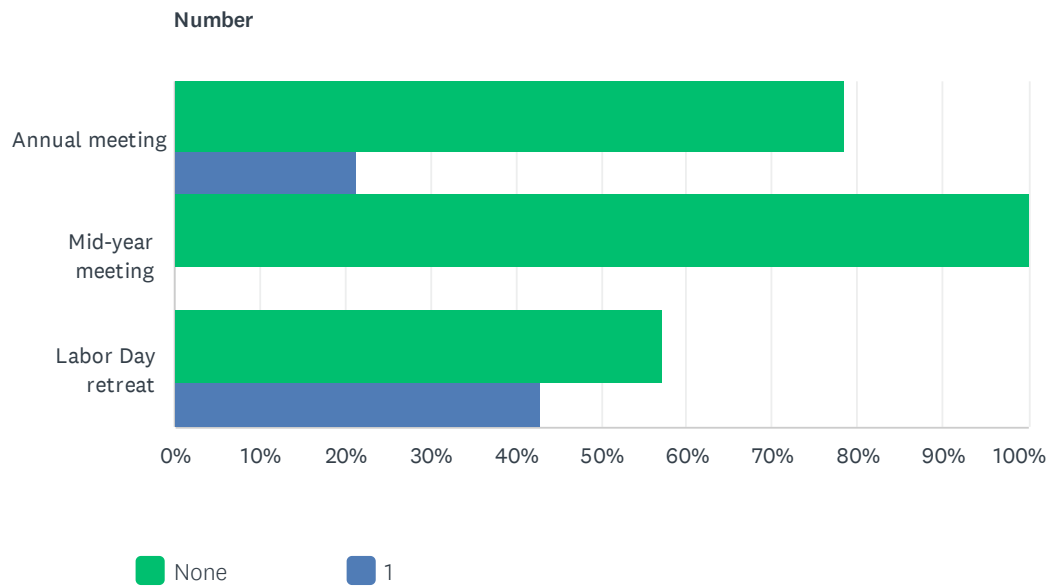
Answered: 14 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	50.00%	7
No	50.00%	7
TOTAL		14

## Q10 When you were a Scholar, how many of each of the following BLS meetings did you attend?

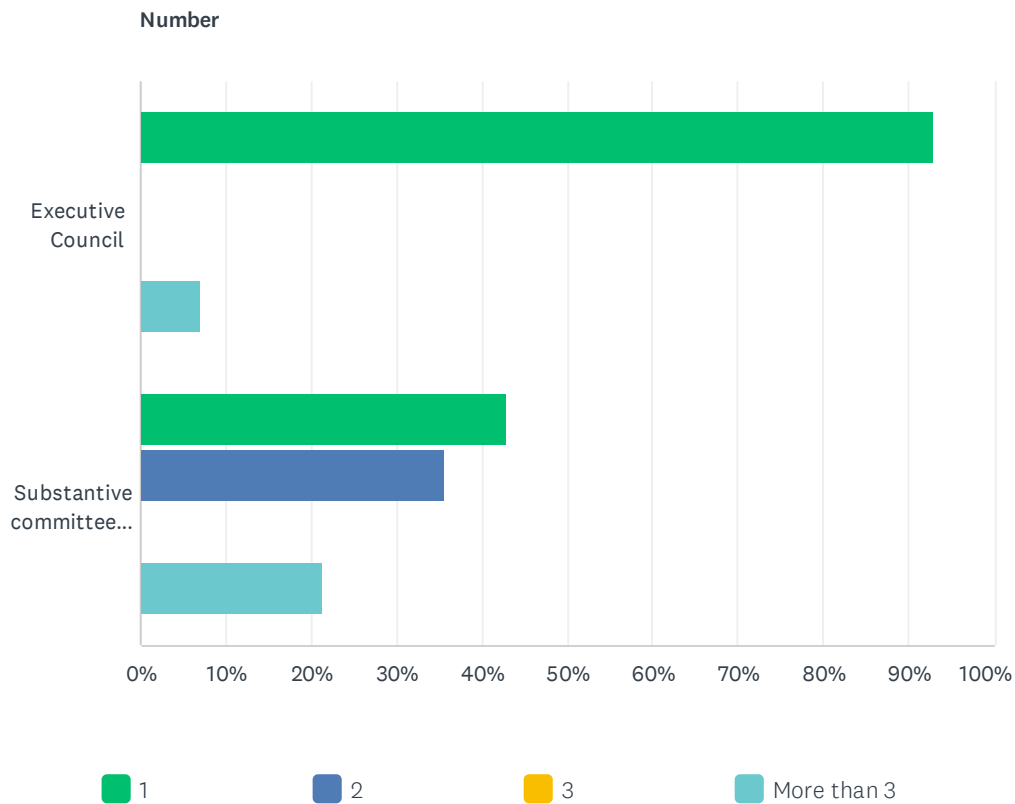
Answered: 14 Skipped: 0



Number				
	NONE	1	TOTAL	
Annual meeting	78.57% 11	21.43% 3	14	
Mid-year meeting	100.00% 14	0.00% 0	14	
Labor Day retreat	57.14% 8	42.86% 6	14	

## Q11 When you were a Scholar, how many of the following specific types of BLS meetings did you attend?

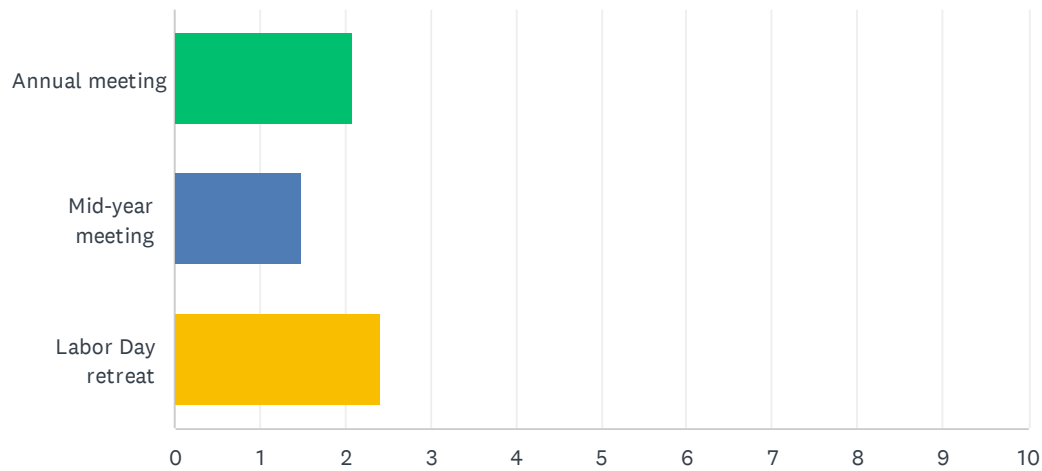
Answered: 14 Skipped: 0



Number					
	1	2	3	MORE THAN 3	TOTAL
Executive Council	92.86% 13	0.00% 0	0.00% 0	7.14% 1	14
Substantive committee meeting	42.86% 6	35.71% 5	0.00% 0	21.43% 3	14

**Q12 Please rank the following BLS meetings in order based on what is most convenient to attend as a law student (placing the most convenient at the top and the least convenient at the bottom).**

Answered: 10 Skipped: 4

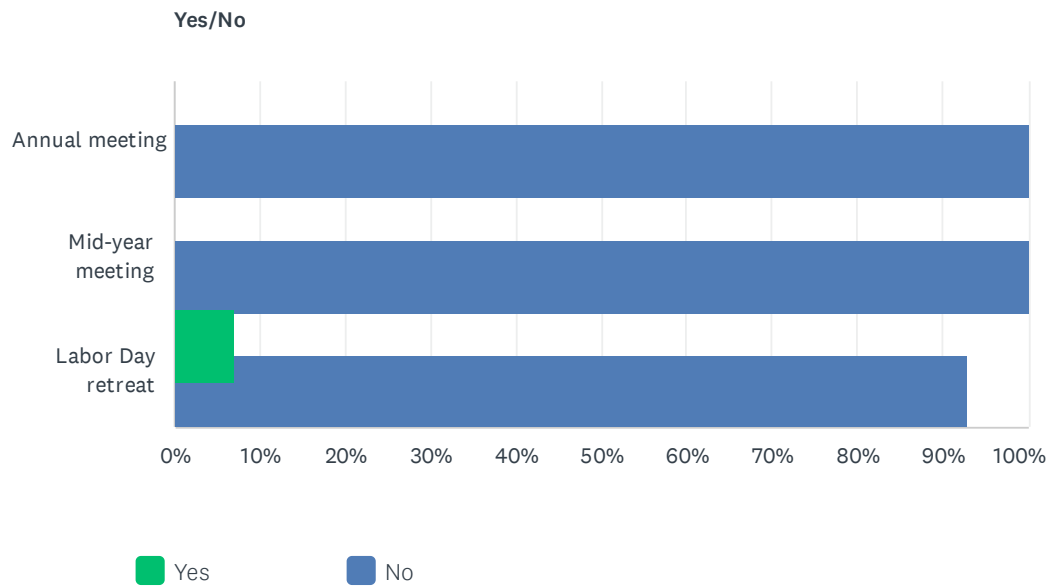


	1	2	3	TOTAL	SCORE
Annual meeting	30.00% 3	50.00% 5	20.00% 2	10	2.10
Mid-year meeting	0.00% 0	50.00% 5	50.00% 5	10	1.50
Labor Day retreat	70.00% 7	0.00% 0	30.00% 3	10	2.40



## Q13 Since your term as a Scholar ended, have you attended any of the following BLS meetings?

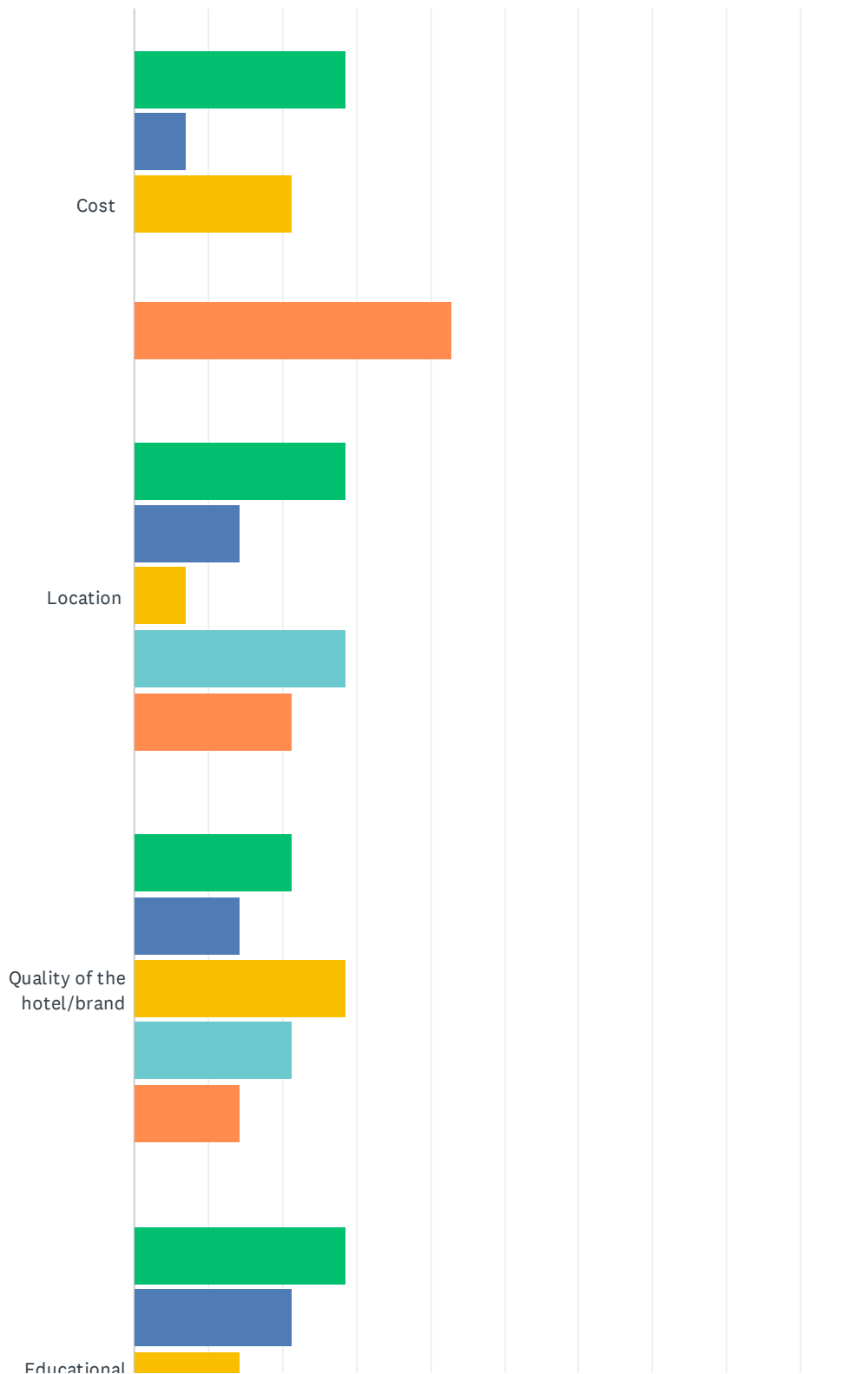
Answered: 14 Skipped: 0

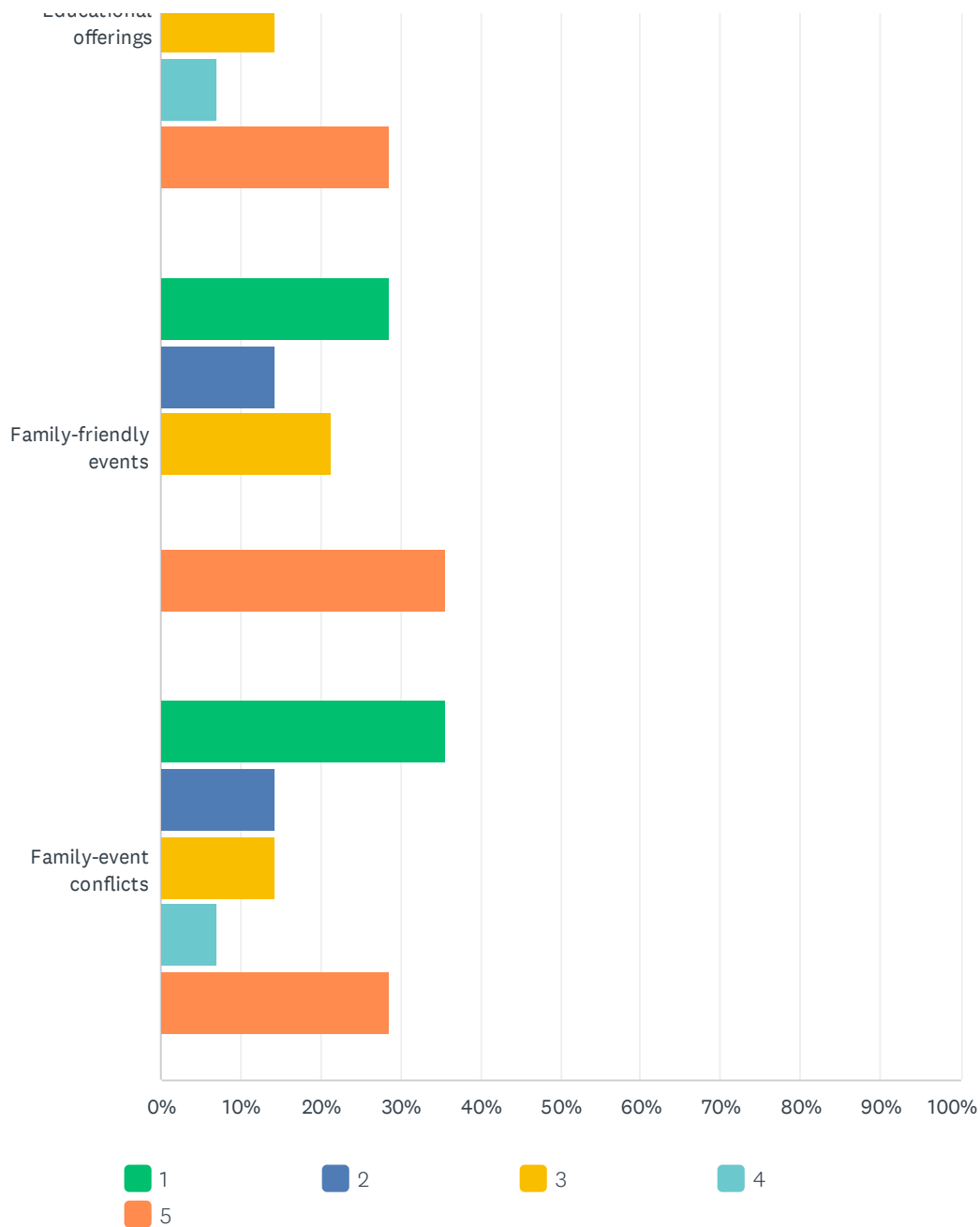


Yes/No				
	YES		NO	TOTAL
Annual meeting	0.00%	0	100.00%	14
Mid-year meeting	0.00%	0	100.00%	14
Labor Day retreat	7.14%	1	92.86%	13

Q14 On a scale of 1-5, with 1 being the top rating, how important are the following factors in deciding whether to attend BLS meetings in the future (assuming you are or will be admitted to The Florida Bar)?

Answered: 14 Skipped: 0

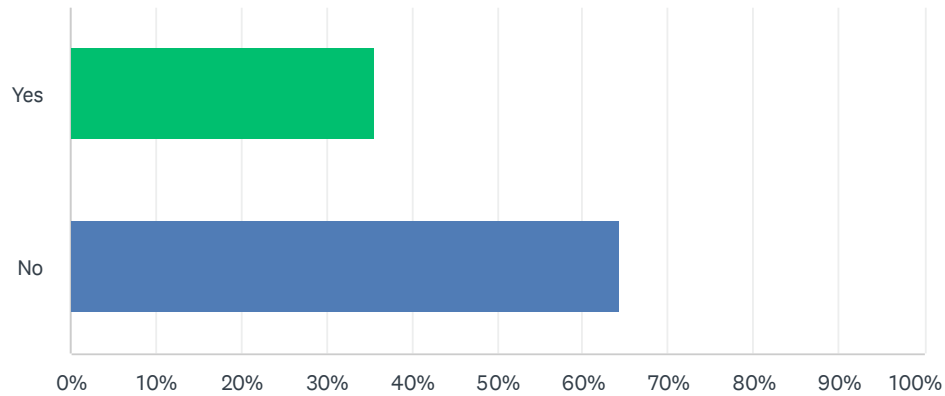




	1	2	3	4	5	TOTAL	WEIGHTED AVERAGE
Cost	28.57% 4	7.14% 1	21.43% 3	0.00% 0	42.86% 6	14	2.79
Location	28.57% 4	14.29% 2	7.14% 1	28.57% 4	21.43% 3	14	3.00
Quality of the hotel/brand	21.43% 3	14.29% 2	28.57% 4	21.43% 3	14.29% 2	14	3.07
Educational offerings	28.57% 4	21.43% 3	14.29% 2	7.14% 1	28.57% 4	14	3.14
Family-friendly events	28.57% 4	14.29% 2	21.43% 3	0.00% 0	35.71% 5	14	3.00
Family-event conflicts	35.71% 5	14.29% 2	14.29% 2	7.14% 1	28.57% 4	14	3.21

**Q15 Are you aware that you can attend substantive BLS committee meetings without paying a registration fee or staying overnight for the entire annual meeting or separate BLS meeting?**

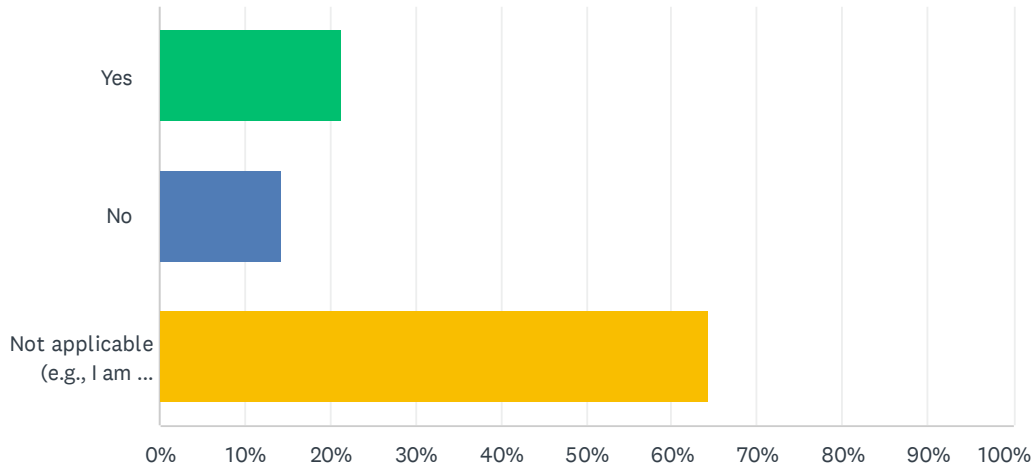
Answered: 14 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	35.71%	5
No	64.29%	9
TOTAL		14

## Q16 Does your current employer provide financial support for you to attend BLS meetings

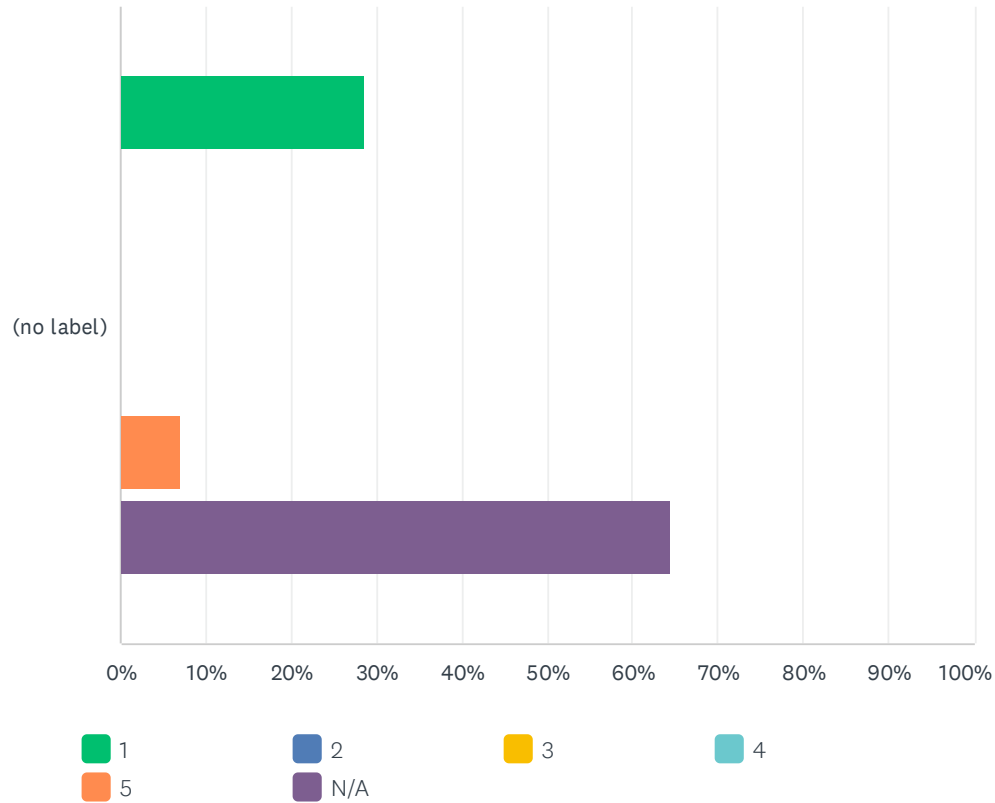
Answered: 14 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	21.43%	3
No	14.29%	2
Not applicable (e.g., I am a sole practitioner or not a member of The Florida Bar)	64.29%	9
TOTAL		14

## Q17 On a scale of 1-5, with 1 being the top rating, does your current employer encourage your participation in BLS activities?

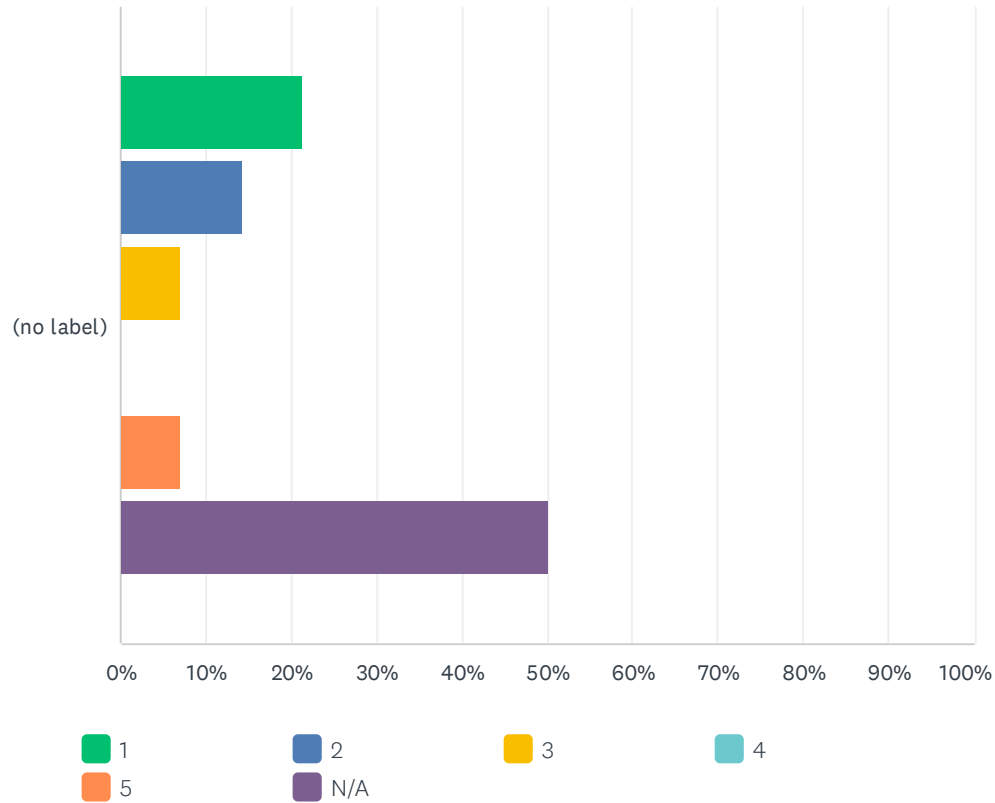
Answered: 14 Skipped: 0



	1	2	3	4	5	N/A	TOTAL	WEIGHTED AVERAGE
(no label)	28.57%	0.00%	0.00%	0.00%	7.14%	64.29%		
	4	0	0	0	1	9	14	4.20

## Q18 On a scale of 1-5, with 1 being the top rating, how effective was your involvement in the BLS in securing employment?

Answered: 14 Skipped: 0



	1	2	3	4	5	N/A	TOTAL	WEIGHTED AVERAGE
(no label)	21.43%	14.29%	7.14%	0.00%	7.14%	50.00%		
	3	2	1	0	1	7	14	2.93

Q19 During my term as a Scholar, I wish I had had more opportunities to .

. .

Answered: 8   Skipped: 6



## Q19 During my term as a Scholar, I wish I had had more opportunities to .

• •

Answered: 8 Skipped: 6

#	RESPONSES	DATE
1	Attend meeting and network. Unfortunately I became a scholar during the beginning of the pandemic.	7/13/2023 11:41 AM
2	Attend more of the meetings. I really enjoyed being able to attend the annual meeting, but I would not have attended the annual meeting if my school didn't assist in paying the bulk of the cost. I wish the section made it more affordable and provided large stipends to encourage students to attend.	7/12/2023 6:24 PM
3	I was not able to participate in anything due to the hurricane	7/12/2023 6:22 PM
4	...connect with attorneys. I met great people, just not enough time to get to know everyone!	7/12/2023 5:50 PM
5	attend meetings as I was unable to go due to a hurricane	7/10/2023 8:42 AM
6	More opportunities to connect with potential employers with the purpose being for future employment	7/8/2023 2:16 PM
7	Experience the opportunities available to me. I was a Scholar during a period where very little was taking place because of COVID.	7/7/2023 11:35 PM
8	Actually make use of it. I was a scholar when a hurricane cancelled the Labor Day retreat and COVID followed	7/7/2023 8:53 PM

Q20 During my term as a Scholar, I would have participated more if . . .

Answered: 7   Skipped: 7

## Q20 During my term as a Scholar, I would have participated more if . . .

Answered: 7   Skipped: 7

#	RESPONSES	DATE
1	Covid-19 did not disrupt planned events and/or if more events were virtual.	7/13/2023 11:41 AM
2	The section did a better job of staying in contact. My mentor spoke to me one time throughout the whole scholars program and did not seem very interested in mentoring me. I also wished the section did a better job of advertising at the different law schools to encourage more people to apply and get involved.	7/12/2023 6:24 PM
3	...locations were closer to my law school.	7/12/2023 5:50 PM
4	the hurricane hadn't moved the date	7/10/2023 8:42 AM
5	See above	7/8/2023 2:16 PM
6	More was taking place. Please see My previous response.	7/7/2023 11:35 PM
7	Acts of god would have allowed	7/7/2023 8:53 PM

Q21 During my term as a Scholar, I felt it was a waste of time to . . .

Answered: 5   Skipped: 9

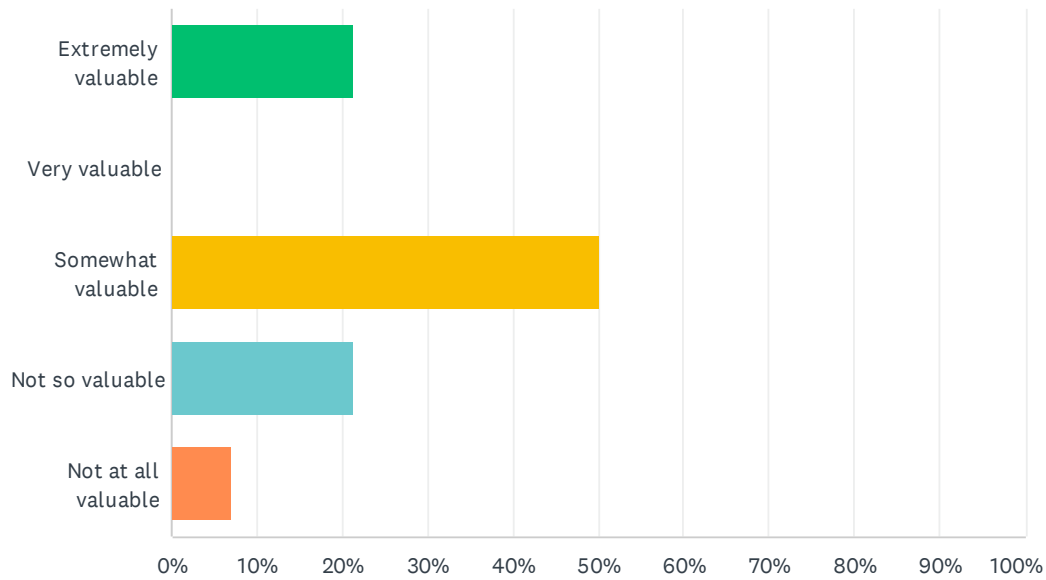
## Q21 During my term as a Scholar, I felt it was a waste of time to . . .

Answered: 5   Skipped: 9

#	RESPONSES	DATE
1	N/A.	7/13/2023 11:41 AM
2	N/A	7/12/2023 5:50 PM
3	Attend the cocktail hours	7/8/2023 2:16 PM
4	N/A	7/7/2023 11:35 PM
5	N/a	7/7/2023 8:53 PM

## Q22 Please rate your overall experience as a Scholar.

Answered: 14 Skipped: 0



ANSWER CHOICES	RESPONSES	
Extremely valuable	21.43%	3
Very valuable	0.00%	0
Somewhat valuable	50.00%	7
Not so valuable	21.43%	3
Not at all valuable	7.14%	1
TOTAL		14

## **BLS Scholars & Fellows Survey Observations**

*Response rates* (a response rate of 50 percent or higher is excellent):

36 Fellows returned 28 responses, a 77.8 percent response rate.

25 Scholars returned 15 responses (one via email), a 60 percent response rate.

### **Fellows Survey Observations**

*Zach Hyman's Takeaways*

Only 2 do not practice business law.

10 out the 27 were not involved in substantive committees.

An equal number of fellows were neutral about their mentors as were satisfied.

The fellows were satisfied with the level of communication but felt that they could have more structure.

*Judge McEwen's Takeaways*

High response rate, so the survey is reliable.

We don't have a problem retaining! Only 3 of 28 not a member; 2 of those don't practice biz law and one cites cost as the reason.

Communication breakdowns [cover in Handbook]:

- Appx 36% not assigned to a substantive committee,
- Appx 32% not assigned a mentor,
- Only appx 36.5% very satisfied/satisfied with the mentor,
- Appx 14% unsatisfied with communication re financial benefits,
- Most that didn't use stipend cited inability to attend things/Covid – apparently didn't know about other uses, and
- Appx 29% didn't know that one can attend BLS meetings w/o paying registration fee.

Since the Fellowship, most *have* attended the three big meetings.

Most important factor in attending: Cost and networking tied for highest % of 1 or 2 rank.

Education offerings are least influential in decision to attend.

Less than 50% get support from employers, and only appx 36% of employers encourage.

Engagement in BLS was not meaningful factor in gaining employment, under 18% in rank of 1 or 2.

Open-ended question answers at Q20 have suggestions for Handbook text (I think we've got the topics in the outline already). Ditto Q21.

Program is well received: more than 89% rank extremely valuable or very valuable.

### **Scholars Survey Observations**

#### *Zach Hyman's Takeaways*

They seem to value cost, and educational content highly. I was surprised however, to see that quite a few scholars also liked "family friendly" events.

The Scholars did not care which meeting they attended.

Across the board the scholars wish that there was more direct contact with the BLS, and the scholars did not seem to be involved in substantive committees.

Only 50% of the Scholars ended up being practicing attorneys in Florida.

There were only 14 people to complete the survey [plus one by email]. That seems low for scholars. [Compiler's note: But the response rate was 60 percent, which is excellent.]

#### *Judge McEwen's Takeaways*

Half of the responders are not members of The Florida Bar. Of the other half, five are practice business law and four of those are section members.

More than 90 percent say they were assigned to a substantive committee.



Approximately 64 percent say they were not assigned a mentor.

Half were not satisfied with communication about financial benefits.

Best attendance was at the mid-year meeting. But the Labor Day retreat drew the most votes for most convenient.

Most important factor in attending: Avoiding family-event conflicts, then educational offerings.

Most didn't know that one can attend BLS meetings w/o paying registration fee.

More than a third thought that BLS involvement helped gain them employment.

Open-ended question answers show a desire for better networking, better communication with mentor.

Program is not well received: More than 78 percent indicated that the program is only somewhat valuable and even less than that.

## S/F RETENTION BEST PRACTICES HANDBOOK. OUTLINE

- o Mission Statement and Purpose
  - What is the purpose of the Fellows and Scholar Programs, and what is the goal of having them involved.
  - Overlap and distinctions between the two programs, including oversight functions (Membership v. IMF).
- o Selection of Participants and Publicity of Programs [Omit as unrelated to retention?]
  - Criteria for Selection of Scholars and/or Fellows
  - Points of Contact from other Schools
  - Timing of Application Pool
  - Information Session
- o Onboarding/Orientation
  - Welcoming Materials
    - Chair form letter/video
  - Welcoming/Orientation Program
    - CLE/Program
      - Contents: BLS mission, initiatives, structure, committees, task forces, website, benefits, communications
    - In-person reception
    - Expectations of Scholars
      - Participation during select meetings/conferences
      - Participation in Substantive Committees
      - Admin. support for CLE
      - Future involvement in Section
      - [Placeholder for anything specific to Scholars]

- Expectations of Fellows
    - Participation during meetings/conferences
    - Participation in Substantive Committees
    - Admin. support for CLE
    - CLE attendance opportunities
    - Future involvement in Section
    - [Placeholder for anything specific to Fellows]
  - Appointment of Mentor(s)
  - Leadership Training
- o Mentorship
- Best Practices for Mentors
  - Role of Mentor
    - Include distinction between mentoring Fellows v. Scholars, if any
    - [Placeholder for role of Social Mentors, if any]
    - [Placeholder for role of Substantive Mentors, if any]
  - Responsibilities of Mentor
  - Mentor Training
- o Programming **[Don't know what programming means]**
- Best Practices for in-person programming
  - Regular programming and committee participation
  - Substantive Committee Involvement
    - What Substantive Committees do
    - Ways to become involved in Substantive Committees
    - Task Force Participation
  - Standing Committee Involvement
    - Difference between Standing Committee and Substantive Committee
    - Ways to become involved in Standing Committees

- Best Practices and expectations of committee and Scholars/Fellows.
- o Financial support
  - Budget by category (S v. F)
  - Appropriate uses of stipend
  - How to apply for reimbursement
  - Use it or lose it policy
- o Recognition
  - Name tags
  - Social media/print media/website kudos
  - "Graduation" ceremony at annual BLS luncheon
  - Opportunities for discounted/new membership
- o Exit Interview
  - Interview tool topics
  - Reporting to Membership/IMF
- o Re-solicitation
  - Identify non-renewals (Section administrator)
  - Chair invitation (sample form letter)
  - Outreach by former mentors
- o Appendix
  - Form letter templates
  - Compliance tracking report

# **Style Guide for the Business Law Section of the Florida Bar**

## **Scholars and Fellows Handbook**

The purpose of this style guide is to provide a uniform look to the Business Law Section of the Florida Bar Scholars and Fellows Handbook (the “S/F Handbook”) and to minimize the amount of editing issue editors must perform in readying their issue for publication. The Scholars and Fellows Retention Taskforce Committee requests those who submit sections to the S/F Handbook to adhere to the style manual and thanks those who do so.

### **1. Capitalization.**

- a. Lower case generic terms; *e.g.*, supreme court, district court of appeal, circuit court, chief judge, judge, state attorney, state, department, rules, rules of civil procedure, bar, board of governors.
- b. Capitalize proper names; *e.g.*, State of Florida, Supreme Court of Florida, The Florida Bar, The Business Law Section of the Florida Bar, Scholars and Fellows Program. Use proper names if a generic term is ambiguous.
- c. Capitalize the following events: “Winter Meeting,” “Mid-Year Meeting,” “Annual Meeting,” “Annual Conference,” and “Labor Day Retreat.”

### **2. Abbreviations.**

- a. *i.e.* and *e.g.* The abbreviation *i.e.* stands for “that is” or “in other words.” Use it when you paraphrase what you've just written or point out something important about what you've just written. *Human error contributed to the accident at Chernobyl (i.e., the technology was only partly to blame).*
- b. The abbreviation *e.g.* stands for “for example.” Use it to introduce one or more examples of a point you've just made. *The legislation was supported by a number of former Presidents (e.g., Gerald Ford, Jimmy Carter, and Ronald Reagan).* Notice that *i.e.* and *e.g.* appear inside parentheses. They never begin a sentence.
- c. To help remember the difference between *i.e.* and *e.g.*, match “i” to *is* and “e” to *example*.

### **3. Commas.**

- a. Formal (not press) style (do insert a comma before conjunction and last item) (*e.g.*, Her hobbies include traveling, quilting, fencing, and cooking.).

- b. Ordinarily, be sure that each clause is a complete sentence (subject and verb on each side), i.e., avoid inserting a comma before a dependent clause or a restrictive clause.

#### **4. Numbers.**

- a. Spell out ten and less, use numerals for 11 and over, use numerals for mixed style (e.g., “3 men ate 20 hotdogs in the contest”).
- b. Ordinals: Normal font, not superscript (11th Circuit, not 11<sup>th</sup> Circuit).
- c. Phone numbers: 813.555.1212 (international style).

#### **5. Lists.**

- a. If items in a list could stand alone as sentences, begin each with a capital letter and end with a period. Insert needed language into the introduction to ensure clarity on whether all items in the list apply or whether any one of the items.
- b. If items in a list cannot stand alone and if they complete the thought of the lead-in sentence, begin each item with a lower case letter and end with a semicolon. End the last item of the list with a period, unless the sentence continues after the last item. If items are followed by one or more sentences, begin with a lower case letter and end with a period.
- c. If items are not part of the lead-in sentence, use initial capitals and end with a period, even if the items are sentence fragments.
- d. Do not repeat a word or phrase at the beginning of items in a list; move the word or phrase to the sentence introducing the list.
- e. Use Roman numerals, then capital letters, then lower case letters and finally lower-case Roman numerals to denote lists (e.g., “I. Heading;” “A. Subheading;” “b. Sub-sub heading;” “i. Sub-sub-sub heading.”

**6. Word choice.** Writing in plain language means writing clearly. It means writing so that readers can, find what they need, understand what they find, and use what they find to meet their needs. The more clearly you communicate, the more likely your readers will grasp what you want them to grasp and do what you want them to do, from filling out a form correctly to complying with a regulation. And the less likely it is that your readers will call or write you to ask questions or express frustration. In general, rules should be written in simplified language, not “legalese.” When appropriate, avoid use of words such as “therein,” “wherefore,” and “in lieu of.” Use “on” rather than “upon,” “to” rather than

“in order to,” “under” rather than “pursuant to,” “before” rather than “prior to,” “use” rather than “utilize,” and “must” rather than “is required to” or “shall.”

## 7. Gender-Neutral Language.

- a. Avoid the implied sexual bias of words such as “chairman” and “mailman” as well as sentences such as Each manager must submit his report by July 15.
- b. Use gender-neutral terms or revise the sentence to avoid the personal pronoun.

## 8. Additional Formatting.

- a. **Font/typeface:** All documents must be submitted in MS Word, 12-point font.
- b. **Dates:** When referring to a month, day and year, do not set off the year with commas (e.g., “September 1, 2023 is the start of the Labor Day Retreat”).
- c. **Dashes:** Use an “m” dash or two hyphens, not a single hyphen (the “m” dash is about equal to two hyphens) and put a space on either side.
- d. **DIP:** Do not use hyphens in between letters (not D-I-P).
- e. **Ellipses:** Use spaces between them (e.g., . . . ). For ellipses signifying the end of a sentence, use four (e.g., . . . .).
- f. **Email addresses** should not be underlined (e.g., cmcewen@flmb.uscourts.gov).
- g. **Headlines and subheads:**
  - i. Headlines should be flush left, in bigger font than byline (at least 2 pts.), currently used font, not underlined, and stacked pyramid style if more than one line not equal in length.
  - ii. Subheads should be caps and lower case, bold, not underlined (unless necessary for readability), not italicized, and not indented.
- h. **Judge v. Hon./Honorable:** Hon., Honorable, and The Honorable are appropriate for invitations, letters, and placards. Therefore, we use Judge as the title when referring to a judicial officer in the S/F Handbook.
- i. **Justification:** Titles and bylines should be centered; articles should be formatted with full justification.
- j. **Paragraphs** should be indented.
- k. **Percent:** Spell out (percent not %).
- l. **Plural possessive:** For plural nouns ending in s, add only an apostrophe (e.g., the students' program). For singular common nouns ending in s, add 's (e.g., the witness's answer). For singular proper names ending in s, use only an apostrophe (e.g., the United States' talented Article I judicial officers handle more than a million bankruptcy cases each year with great efficiency).

- m. **Retired Non-recall Judges:** Use “(, Ret.)” after the jurisdiction in a reference to the judge or “(Ret.)” after the jurisdiction in a byline (e.g., “Joel Rosenthal (D. Mass, Ret.)” or “By Joel Rosenthal, District of Massachusetts (Ret.)”).
- n. **Quoted material:** Use a comma before the quote and not a colon.
- o. **Spacing:** Use double line spacing for submitted drafts. Use *two* spaces after a period at the end of a sentence.
- p. **Symbols:**
  - i. When citing to a statute, spell out “section” unless citing to the United States Code, in which case use §.
  - ii. Spell out percent (do not use % sign).
- q. **Time:** Use lower case a.m. or p.m. to signify morning or afternoon, and not capitals without periods (e.g., not AM, PM).
- r. **Titles:** Put quotation marks around a book, movie or song title, but not a newspaper.
- s. **URLs:** Blue font and not underlined blue (e.g., [www.google.com](http://www.google.com)). Omit “http” unless it is “https”(e.g., <https://jport.uscourts.gov>). (This should not require the author to change the font color in most cases because hyperlink format is a default auto format setting for URLs for many; however, hyperlink will add an underline that must be removed manually.) N.B.: This formatting shows the links better in the online version.



## S&F TASK FORCE SEQUENCING PLANS

Current and future sequencing of deliverables (these lists are organic) ( $\sqrt{}$  = *done*):

### **For the Surveys, we need to:**

- $\sqrt{1}$ . Task a point person to collect proposed survey question submissions for both a Scholar version and a Fellow version.
- $\sqrt{2}$ . Set a deadline to submit proposed survey question submissions. Point person will have to follow up with non-responders.
- $\sqrt{3}$ . Select a survey platform. N.B.: Survey Monkey charges for text boxes that are used with questions calling for narrative answers (does BLS have a subscription?). AllCounted includes free text boxes.
- $\sqrt{4}$ . Set a deadline for chairs and survey point person to meet to discuss proposed survey question submissions and old questions for inclusion/exclusion and prepare final survey tool.
- $\sqrt{5}$ . Task a point person to get lists of and contact info for Scholars and alums and Fellows and alums from Stefanie for use in sending the survey links.
- $\sqrt{6}$ . Set a deadline for survey responses to be submitted.

### **7. Circulate survey response data to all.**

\*\*\*

### **For the Handbook, we need to:**

**1. Set a meeting to discuss survey responses and what new initiatives and Handbook content they suggest** (and where to pigeonhole that content). Can be done by email request or via Zoom after Survey Monkey metrics are distributed (before end of subscription month, which ends July 20).

### **2. Revise table of contents to reflect meeting results.**

$\sqrt{3}$ . Task a point person to prepare (or adopt) and distribute a style guide so that multiple authors will use same conventions, leading to uniform formatting and textual treatment and cutting down on editing. (E.g., Content divisions such as what to do, why(?), who, when. Use of Oxford commas. Font type and size. Line spacing. Margins. Headers and subheads. 1 space vs. 2 spaces. And the like.) Check with Fla. Bar for its web and print style guidelines. Another example (already circulated to chairs) is the NCBJ Style Guide. Katherine Van de Bogart submitted her recommendations.

4. Obtain current handbook/guides from Membership and IMF (Marianne and Kelly) to avoid recreating the wheel on best practices for some of the outline topics. **Information requested.**
5. Appoint members to draft specific sections of the Handbook based on volunteer preferences. **Volunteers have been solicited; need to assign once Handbook outline is finalized.**
6. Ask everyone (again) to review the retention materials we've provided and research for and review other resources before they begin drafting their portion.
7. Appoint an editor to edit the Handbook draft.
8. Ask everyone to review the pre-final draft Handbook and look for and submit to editor nits, inconsistencies, etc.
9. Task section authors to prepare a corresponding section for the compliance tracking template.
10. Appoint an editor to edit the compliance tracking template.
11. Ask everyone to review the pre-final draft compliance tracking template and look for and submit to editor nits, inconsistencies, etc.
12. Request/create any referenced template letters, emails, memos, follow-ups for Appendix.
13. Submit Handbook to BLS Chair and IMF and Membership Committees with request for orientation meeting to highlight implementation/accountability measures and urge adoption.

\*\*\*

**For the 23-23 Bar year Task Force Membership, we need to:**

- √1. Confirm with the incoming chairs of the various committees who provide a representative as a mandatory member that their designee (set out below) will continue:

Bankruptcy/UCC – Marianne Doris  
Blockchain – Jude Cooper  
Business Lit – Katherine Van de Bogart  
Communications – Crystal Potts  
Computer Law - Daniel Davis  
Corporations – Michelle Suarez  
IMF Committee – Christina Taylor  
IP Committee – Elizabeth Stamoulis

## Membership – Juan Mendoza

2. Remind the mandatory representatives (whether continuing or new designees) of their obligation to attend our meetings.