



BUSINESS LAW SECTION
OF THE FLORIDA BAR

**SCHOLARS AND FELLOWS'
HANDBOOK**


I. Mission Statement and Purpose

A. What is the purpose of The Florida Bar Business Law Section's Fellows and Scholar Programs, and what is the goal of having Fellows and Scholars involved in the Section?

- a. The Business Law Section ("BLS") must effectively recruit young and future lawyers to sustain the vitality and membership of the section. The BLS has a longstanding commitment to the recruitment of young and diverse lawyers and law students to join, participate, and serve in leadership positions. To facilitate its goals, the BLS developed two formal mentoring and fellowship programs, each targeting a different sector of future members and leaders, with both designed to assist in these future members' professional development. The Fellows Program is for young lawyers; the Scholars Program is for law students.

B. Fellows Program

- a. In 2011, the BLS's Diversity Committee, now known as the Inclusion, Mentoring, & Fellowship Committee ("IMF"), issued a strategic plan designed to increase diversity and inclusion within the BLS' membership and leadership. In furtherance of this goal, the BLS created the Fellows Program in 2013 to provide a two-year subsidy to a select number of qualified applicants who express an interest in becoming active in the substantive work and leadership of the BLS. The Fellows Program is designed to assist a diverse and inclusive group of lawyers develop legal competencies; enhance relationships within the BLS, especially with those in the BLS leadership; and enhance their leadership skills to become better leaders within our profession and the BLS. Each Fellow is assigned two mentors: a social mentor and a substantive mentor. The social mentor, who is a member of the executive council, assists the Fellow in maximizing the Fellow's experience in the Program while the Fellow attends BLS meetings and events. The substantive



mentor assists the Fellow's active involvement in the substantive committee that most closely fits the Fellow's legal practice area, with the goal of maximizing professional development.

- b. IMF selects Fellows based on a competitive application process and assigns them their mentors. The Program initially started with six members per year and has grown to eight per year. A sample application is available here: flabizlaw.org/fellowship-application/.

C. Scholars Program

- a. The Scholars Program, created by the BLS's Membership Committee in collaboration with IMF in 2015, was initially designed to further this goal by providing law students the opportunity to attend its yearly flagship event, the BLS's Labor Day Retreat. Through the Scholars Program, the BLS can introduce students to the BLS by providing them the opportunity to interact with seasoned business lawyers and judges and getting them involved in the various committees and projects of the BLS. At the retreat, Scholars were able to immerse themselves in the social and academic activities, providing them the opportunity to build meaningful relationships, join and participate in substantive law committees, and learn recent developments in the law by attending continuing legal education sessions.
- b. As a participant in the Scholars Program, each Scholar is assigned a mentor to help the Scholar navigate the retreat and its events and to share with the Scholar advice for a successful career in business law. Upon completion of the Program, each Scholar will receive a certificate recognizing participation in the Program. Scholars are encouraged to list involvement in the Program on their resume. In addition, Scholars will receive continued opportunities for involvement in the BLS, helping them stand out from their peers. Each Scholar is entitled to a stipend or subsidy toward the cost of the retreat.
- c. The Membership Committee selects Scholars based on a competitive application process and assigns them a mentor. A sample application is available here: flabizlaw.org/wp-content/uploads/2023/07/2023-BLS-Scholars-Program-Application.pdf.

II. TTSelection of Participants and Publicity of Programs

A. Criteria for Selection of Scholars and/or Fellows

- a. In order to be a Fellow, an applicant must (i) be a current member of the BLS; (ii) be practicing in the Florida Bar for fewer than 10 years or younger than 36 years of age; and (iii) demonstrate that a substantial portion of their practice is focused on the area of business law. Once an applicant applies to be a Fellow, acceptance or rejection of such applicant is decided by the IMF Committee on a discretionary basis. All Fellows are required to confirm their commitment to attending meetings and agree to become involved with/take an active role in the BLS and/or act as a mentor to a member of the incoming class.

- b. There is no criteria or requirement that has been promulgated for a law student to become a Scholar.
- c. Having a “substantial interest” or portion of one’s practice being related to business law is not clearly defined or clarified and does not focus or advance the goal of the Fellows or Scholars Program.
- d. Out of the 27 fellows who responded to a questionnaire, only two claimed that they did not continue to practice business law.
- e. As a result, having an interest in business law or practicing business law does not appear to be an effective mechanism to determine whether someone is likely to be retained as a continuing and active member of the BLS.
- f. For Scholars it is also recommended that the BLS work with law schools to identify potential candidates for the scholars program. Specifically, membership should
 - a. Identify a BLS liaison at each accredited Florida law school and update the Membership Committee’s law school contact list accordingly. This should be the responsibility of the First Vice Chair.
 - b. Reach out to the Florida law schools to promote the Scholars Program and secure their support for any of their students selected for the Program. The Committee may use the template letter attached as **Exhibit __**.
 - c. Concurrently with the Committee’s outreach to the Florida law schools, the Committee should identify and reach out to the law schools’ business law student organizations, clubs or societies to promote the Program. This should be the responsibility of the Second Vice Chair. The Committee may use the template letter attached as **Exhibit __** and should maintain a list of each school’s business law organization, including faculty contacts.
 - d. The template letters, updated law school contact list, and updated list of law school business law organizations should be saved in the Committee’s Google Drive.

B. Timing of Application Pool

- a. The Fellowship application period begins in January and closes in March. The Florida Bar staff should notify the chair, vice chair, and second vice chair of the IMF committee of incoming Fellowship applications and provide them to same for review. By mid to end of March, the chair of the IMF committee will form a committee to select Fellows from the Fellowship application pool. Applicants are normally selected by the end of March.
- b. There is no current application process with respect to the Scholars Program, but the membership committee has recommended that applications for Scholars begin by February 28 of each year.
- c. Attorneys make plans for an upcoming year during the preceding year, such that having applications open in November may be preferred.

- d. Law Schools on the other hand are not run on a calendar year, like law firms, which means that the timing of applications should be considered differently, and with a focus of allowing law students to apply for the program prior to commencing an academic year.

C. Information Session

- a. There is no information session that is scheduled or planned to advertise or otherwise notify Fellows, Scholars and potential Fellows and Scholars of the opportunities available or how the programs work, prior to applying.
- b. Given the requirement that the Fellows continue to participate in the Fellows Program after their involvement, hosting local happy hours or informational sessions as reunions would provide an excellent opportunity to increase awareness of the Fellows and Scholars Program. An electronic informational session geared towards law students may also facilitate their involvement.

III. Onboarding/Orientation

A. Welcoming Materials

- a. Chair form letter/video

B. Welcoming/Orientation Program

- a. CLE/Program
 - i. Contents: BLS mission, initiatives, structure, committees, task forces, websites, benefits, communications
 - ii. Fellows are required to view introductory videos prepared for BLS members.
- b. In-person reception –
 - a. There is a reception for Scholars and Fellows at the Labor Day retreat, and an informational session that teaches them of their obligations.
- c. Expectations of Scholars
 - i. Attend the June and January meetings for the fiscal year for which they are selected
 - ii. Participation in at least 2 Substantive Committee meetings
 - iii. Attend the signature dinner and luncheon hosted by the Section during the June and January meetings.
 - iv. Engage with BLS mentor prior to the meetings and after the meetings for a debrief
 - v. Provide feedback as to their experience at the end of their term as Scholars.
- d. Expectations of Fellows
 - i. Maintain status as a member in good standing of the Florida Bar's Business Law Section.
 - ii. Attend at least one Substantive Committee Meeting and 1 Standing committee meeting during each BLS Section meeting, for at least two (2) of the three (3) BLS Section meeting held during the first calendar year of the fellowship.

- iii. Submission of an article to the Business Law Section Newsletter/Blog or to the Florida Bar Journal.
- iv. Make a reasonable effort to participate in at least one (1) substantive project (subject to approval by the current IMF Chair or Vice Chair during the first calendar year of a fellowship and shall be solely responsible for notifying the current IMF Chair or Vice Chair before the end of the first calendar year of a fellowship if not possible to accomplish.
- v. Continue to participate in and be active with respect to the Business Law Section.

IV. Mentorship

- **Best Practices for Mentors**

- Mentors are provided the BLS Mentorship Handbook, which details the responsibilities and best practices for mentors. A true and correct copy of the Mentorship Handbook is attached as **Exhibit ___**.

- **Role of Mentor**

- The mentoring relationship is intended to provide general assistance, but it is not a means to provide mentees with answers to case specific questions or to relieve mentees from their own professional responsibilities and obligations.
- Mentors should not assist or advise mentees with personal legal matters or legal matters involving family or friends.
- The mentee is expected to make an independent professional evaluation of all advice received and should be instructed to advise his or her clients based solely upon the mentee's professional opinion, research, and evaluation.
- There is no formal delineation between or amongst different types of mentors. Having such a defined role would help to add structure to the mentor/mentee relationship.

- **Responsibilities of Mentor**

- a. The mentor is required to set up an initial meeting with the mentee, and establish a regular meeting schedule
- b. The mentee is required to have topics to discuss at the meetings with the mentor once scheduled.
- c. The mentor should give recommendations and general advice, but not specific guidance as to specific matters
- d. The mentor should maintain, unless the safety of third parties is implicated, all communications with the mentee confidential.

- **Mentor Training**

- a. There is currently no program that is intended to provide training for mentors and mentees.

- b. Having an in-person orientation or a session to formally introduce mentors and mentees would facilitate the mentor and mentee relationship and would

V. Programming

A. Best Practices for In-Person Programming

- a. Hosting events with lawyers and judges in the interested areas of practices of the Scholars and Fellows. Examples would include CLEs, happy hours, lunch and learns, mentoring events, speed networking, and question and answer sessions.
- b. Hosting events in different geographical areas throughout the year, including but not limited, Miami, Orlando, and Tampa, so that different lawyers and judges can attend.
- c. Ensure events are marketed and promoted timely and often, including sending calendar invites and scheduling reminders to occur sometime the week of each event.

B. Regular Programming and Committee Participation

- a. Events should occur once a quarter. Events can be scheduled more frequently if budget allows. Scholars and Fellows should attend at least one in person event per quarter.
- b. Scholars and Fellows should be required to attend at least one BLS committee meeting of their choice per year. Scholars and Fellows are encouraged to attend BLS committee meetings as frequently as they occur in compliance with the rules governing their respective Program, which will supersede this handbook should they differ.

C. Substantive Committee Involvement

- a. All Scholars and Fellows must join at least one BLS substantive committee.
- b. Scholars and Fellows are encouraged to join more than one BLS substantive committee.

D. Standing Committee Involvement

- a. All Scholars and Fellows must attend at least one BLS standing committee meeting each year.

E. Best Practices and Expectations of IMF and the Scholars and Fellows

- a. Members of IMF and other BLS committees should make themselves available to address all Scholars and Fellows' questions or inquiries.

- b. All Scholars and Fellows should submit an annual memo to the IMF Chair identifying the committees they participated in, any mentors or mentees they have worked with, and their goals are for the following year. IMF should review each memo and follow up with the Scholars and Fellows as needed.
- c. Fellows must complete at least one substantive project in accordance with the rules governing the Fellows Program; and they must contribute to the BLS blog at least once per year. Scholars should be encouraged to also contribute to the BLS blog.
- d. IMF should discuss the BLS blog at the first meeting of the year.
- e. IMF should hold at least one mandatory virtual meeting each year during a lunch period, that the Fellows must attend, and which the Scholars should be encouraged to attend, to provide information on how to contribute to the BLS blog.

VI. Financial Support

A. Budget By Category for Scholars and Fellows

- a. Fellows are allocated \$50,000.
- b. Scholars are not currently allocated any money in the BLS budget.

B. Appropriate Uses of the Stipend

- a. Fellows and Scholars are provided and should review the policies and procedures outlined in the memo from IMF to ensure they are properly following same.
- b. Fellows and Scholars should be reminded that the policies and procedures will be strictly enforced, and no exceptions will be made. A true and correct copy of the BLS' policy for reimbursement is attached as **Exhibit __**.

C. Applying for a Reimbursement

- a. Fellows and Scholars should review the policies and procedures outlined in the memo from IMF to ensure they are properly following same.

D. Use It or Lose It Policy

- a. Fellows and Scholars should be reminded that their stipend expires at the end of the given Fellowship or Scholarship year and that the stipend does not carry over nor can it be transferred.
- b. The reimbursement policy also makes it clear that the Florida Bar only reimburses scholars and fellows for expenses actually incurred.

E. Additional Financial Support

- a. The only financial support for Fellows and Scholars is the Stipend. The assumption is that there is a significant financial barrier to participation in BLS meetings.

- b. Mechanisms including, without limitation, identifying room blocks at alternative locations, and finding can permit more affordable participation in BLS events.

VII. Recognition

- A. Name tags**
- B. Social media/print media/website kudos**

Fellows are

- C. “Graduation” ceremony at annual BLS luncheon**
- D. Opportunities for discounted/new membership**

VIII. Exit Interview

A. Interview tool topics

- a. The interviewers should explain that the purpose of the interview is to determine how to encourage and maintain an existing relationship with the interviewee.
- b. A proposed exit interview is attached as **Exhibit __**.
- c. The exit interview should focus on encouraging the retention of the scholars and fellows, by asking questions about programing or other ways to keep them involved.
- d. The exit interview should also assess the likelihood of the scholars and fellows continuing to participate in the program.

B. Reporting to Membership/IMF

- a. The exit interview should be conducted by the Vice Chair of IMF and Membership and the Secretary of the BLS
- b. The Vice Chairs and Secretary should meet, after performing the exit interviews and provide recommendations based on their findings.
- c. This will also demonstrate to the people interviewed a commitment to keeping them involved.

IX. Re-solicitation

A. “Renew Members Early and Often”

- a. The BLS should encourage the Scholars and Fellows to remain active in the BLS even after their time as Scholars or Fellows as ended. A key to membership renewal is “renew members early and often.” membershipmarketing.blogspot.com/2012/04/membership-retention-and-renewal.html.
- b. The average renewal rate for trade and organizational memberships hovers around 85%. *Id.* Drastic declines in membership renewals accompanied the COVID-19 Pandemic and related economic upheavals.

www.accredible.com/blog/5-strategies-for-encouraging-membership-renewals. That tide has turned. *Id.*

B. Reasons for Non-Renewal

- a. Members do not actively participate in the BLS or fail to take advantage of the BLS benefits (this is the most common reason for non-renewal).
- b. Lack of engagement.
- c. Lack of value. Absent engagement, a BLS member may not receive what he/she perceives as the expected value of membership. In such a situation, the member will be unable to justify the cost of membership with a significant return on investment.
- d. Lack of time. For newer lawyers, there is pressure to be productive. Coupled with a desire for an appropriate work/life balance, a member may conclude that he/she lacks the time to participate actively in the BLS.
- e. Financial constraints: one-third of members do not renew membership in an organization because their employer will not pay for dues. This puts a strain on newer lawyers, many of whom are burdened with massive debt.
- f. Exit from the practice of law. Almost one-third of membership organizations report that members are not likely to renew membership if they have left the field.
- g. Member forgot to renew. A sizeable percentage of renewals are the result of the member forgetting to renew. Efforts to ameliorate this problem include frequent communication with the member.
www.membersuite.com/blog/why-members-dont-renew-and-how-to-fix-it

C. Benefits of Membership

- a. Hopefully, Scholars and Fellows have benefitted from membership in the BLS. As the BLS website recites, membership fosters long-term relationships among Florida practitioners and judges, promotes excellence in the practice of law, and offers high-quality continuing legal education opportunities. Thus, the BLS must assure Scholars and Fellows that continued membership will enhance professional success and personal fulfillment.

D. Practical Steps to Improve Retention

- a. At least two months before their tenure ends, each Scholar and Fellow should receive an email from the BLS Chair (or designee) thanking them for their involvement in the BLS and encouraging continued membership in the BLS. Such communication should provide a link to The Florida Bar website for renewal. Ease of renewal promotes a greater retention rate.
- b. Former Scholars and Fellows should continue to receive BLS emails and other communications (letters, brochures, etc.) about programming, legal news, CLE programs, and networking opportunities. Although a Scholar or Fellow has let their membership lapse, outreach by the BLS may prompt a return to active membership.
- c. Within two months of The Florida Bar dues renewal period, the BLS administrator should provide to the chairs of the Scholars and Fellows committees a list of the most recent Scholars and Fellows who have not renewed their BLS membership. This action will allow the BLS to identify

inactive members promptly and attempt to revive engagement with the former Scholar or Fellow.

- d. For those former Scholars or Fellows who have renewed their membership, the BLS Chair (or designee) should send an email or letter thanking the former Scholar or Fellow member for their continued involvement in the BLS.
- e. For those Scholars and Fellows who have not renewed, the appropriate committee chair should send an email or letter encouraging BLS membership. Such communication should remind the former Scholar or Fellow of their activities as Scholars or Fellows. The communication should also recount the benefits of BLS membership.
- f. Within three months after the close of The Florida Bar dues renewal period, the BLS administrator should identify for the BLS Chair and the chairs of the Scholars and Fellows committees those most recent former Scholars and Fellows who have not renewed their BLS membership.
 - i. The mentor who was assigned to each former Scholar or Fellow shall contact the former mentee to:
 - a) Note that the former mentee did not renew their BLS membership.
 - b) Inquire as to why the former mentee did not renew their BLS membership.
 - c) Attempt to obtain specific reasons for non-renewal.
 - d) Remind former mentee of BLS benefits.
 - e) Inquire about actions that would/could make renewal attractive to the former mentee.
 - ii. The former mentor should report back to the respective Scholars and Fellows chairs to report the reasons for non-renewal.
 - iii. If there are financial constraints making membership renewal impossible or difficult, the respective chair should consult with the BLS Chair (or designee) to assess whether a waiver or partial discount of the renewal dues is appropriate.
 - a) Before such a waiver or discount is granted, the Executive Committee should assess:
 - 1) The nature of the financial constraint.
 - 2) The level of BLS involvement by the former Scholar or Fellow.
 - 3) Anticipated contribution to the BLS if dues are waived or discounted.
 - iv. Absent good cause, no dues waiver or discount should exceed one Bar year.

X. Appendix

A. Form letter templates

B. Compliance tracking report