

To: Executive Council

From: Scholars & Fellows Retention Task Force; Mariane L. Dorris, Chair, Kimra Major-Morris, Vice Chair, Honorable Mindy Mora, Judicial Chair

Date: June 18, 2020

Summary of Preliminary Findings from Survey and Exit Interviews with Former Fellows

Overall, the Fellows enjoyed the experience of participating in the Fellowship Program. They enjoyed their interactions with other attorneys active in the Section, were appreciative of the opportunity to get to work with “esteemed lawyers in their fields” and grateful for the opportunity to learn the role the BLS and the Bar play in evolving the legal community. The Fellows were disappointed in not being able to take full advantage of the Fellowship Program due to financial constraints, as well as feeling overwhelmed and daunted by their lack of understanding of the leadership structure of the Substantive Committees and the BLS as a whole.

- I. **Financial Issues:** Fellows reported that due to financial constraints prepaying for events and waiting for reimbursement was a hinderance to their consistent attendance and participation. According to the Survey, events such as the Annual Convention and Mid-Year which do not require registration were better attended than the Labor Day Retreat. In addition, former Fellows also faced financial hardship which impacted their ability to continue to attend BLS events.

Task Force Recommendations for supplement to Fellow Stipend:

(1) The Scholars & Fellows Retention Task Force has received feedback from the former Fellows that while they were active in the Fellowship they were reluctant to participate in meetings, as well as the Retreat due to the fear that the total costs associated with the necessary travel, hotel stay, registration, meals, and incidentals will exceed the current annual stipend of \$2,500.00. The costs of attending events and staying at the host hotels have increased since the implementation of the Business Law Section Fellowship Program in 2011. To resolve these issues without the Fellows needing to incur and carry the additional upfront costs that need to be reimbursed at a later date, the Task Force moves for the Executive Council to approve the following:

In addition to the Fellowship annual stipend, Fellows will also be entitled to a waiver of the BLS registration fees for attending the following BLS events: (i) the Judicial Liaison Dinner (approximately \$150); (ii) the Annual and Mid-Year/Winter Luncheons (approximately \$75); and (iii) the Labor Day Retreat (approximately \$550). The approximate amount of these registration fees totals \$ 775.00 for each participant and there are currently 14 Fellows. The estimated annual financial impact could be \$10,850.

Task Force Recommendation for Retention of Fellowship Alumni:

(2) Fellows who have come to the end of their Fellowship are no longer eligible for stipend reimbursement and as such they are finding it challenging to remain involved and continue to attend BLS events, meetings, and the Retreat based on costs concerns and law firms not willing or unable to partially or fully fund the Fellow's continued attendance. To realize the full potential of the BLS' investment in the Fellows and to encourage more involvement for the BLS' future leaders, the Scholars & Fellows Retention Task Force moves for the Executive Council to approve the following:

The BLS will offer a 50% discount on the BLS registration fees for attending BLS events, such as Judicial Liaison Dinner, BLS Luncheon, and the Labor Day Retreat for BLS Fellowship Alumni for a term of 5 years following the expiration of their Fellowship term. These registration discounts will be limited to a maximum of 50% of the current Fellowship stipend amount for that cycle. The current stipend amount is \$2,500.00, so the maximum discount is approved would be \$1,250.00 annually for each former Fellow who is eligible. There are currently 6 former BLS Fellows who would be eligible for this discount. The current estimated annual financial impact would be a total amount of \$2,325.00 for the 6 Fellows. To qualify for the Fellowship Alumni Discount, the Fellowship Alumni will be required to be mentors to incoming Fellows and actively participate in the Inclusion, Mentoring & Fellowship Committee.

II. Participation & Engagement of Fellows: Fellows reported that although everyone was friendly and welcoming, they found it difficult to meaningfully engage at the Substantive Committee level. Given the lack of guidance and the difference in how each Substantive Committee functions, the Fellows would like more structure and direction on how to effectively participate, information on whom they should be contacting to engage in the work and special projects of each Substantive Committee, and what are the BLS's expectations of them. The Fellows mostly relied on their "Social Mentor" but some (50%) did have contact their "Substantive Mentor". Some Fellows did not have contact with both Mentors and were unaware that they were supposed to have two mentors.

Recommendation:

- (1) Require each Substantive Committee with a Fellow to designate a liaison to assist the Fellow in engaging with the Committee. The Second Vice Chair, as the role best suited to explain the Committee and its work to the Fellow and supervise their participation, should be the designated person.
- (2) Create and provide a CLE or similar program explaining the organizational structure of the BLS, the Substantive Committees, the Standing Committees, etc. Include instruction on Robert's Rules of Order, the role of the BLS and the Bar in lobbying, and participation in *amicus* briefs. The IMF and CLE committees are already preparing a program for the Labor Day Retreat CLE, which hopefully will be recorded and made available specifically for Fellows. The Fellows, as part of their requirements, will be

obligated to report that they have watched the CLE video, and will also be provided with the contact person they can direct their questions to if they still have questions after watching the CLE (perhaps either the IMF chair or the CLE chair). These programs can be virtual and ongoing throughout the term of the Fellowship.

- (3) Have Section leaders create welcome videos as part of an orientation program for new BLS Fellows by Incoming Section Chair and Chairs of the Long Range Planning Committee. These videos should be designed to explain the organizational structure and goals for the Section, the Committees, and the Task Forces.
- (4) Provide Mentor training and create CLE programming designed to educate and cultivate the Mentor/Mentee relationship.
- (5) Create virtual Social and Networking events among the Fellows to encourage team building and feedback on the Fellowship Program.
- (6) Provide name tags for each Fellow identifying the years of their Fellowship. These name tags should be reusable and worn throughout the Fellowship and after.
- (7) Create a "graduation" or celebratory ceremony thanking them for participating, commemorating their dedication to the program and inviting others to attend it to acknowledge their completion of the program and encourage them to stay involved. This year the Fellows would have been recognized at the Annual BLS Luncheon and provided an award commemorating their Fellowship.

III. Future Opportunities: The Fellows were disappointed by a lack of explanation of the organizational and leadership structure of the BLS and the Substantive Committees. There was no "roadmap" of the "leadership tract" and no discussion of how to progress to a leadership role within the BLS. The information was not readily discernable, even after attending meetings for two years.

Recommendation:

- (1) Create and provide CLE or similar programming on Leadership, Networking, Mentoring, etc. These can be done through online platforms designed especially for the Fellows, former Fellows and new/young lawyers.