



Business Law Section of the Florida Bar

INCLUSION MENTORING FELLOWSHIP COMMITTEE

AGENDA

Friday, September 4, 2015

Ritz-Carlton Naples

2:00 p.m – 4:00 p.m.

1. Welcome and Introduction
2. Chair's Report
3. BLS Fellows Report
 - a. Introduction of BLS Fellows
 - b. Status of Spotlight on 2014/2015 BLS Fellows
Report from: Zana Scarlett
 - c. Report from BLS Fellows (Open Discussion)
4. Upcoming Events
 - a. Kozyak Minority Mentoring Picnic to be held on October 31, 2015 from 12 p.m.-4 p.m.
@ Amelia Earhart Park, 401 E 65th St, Hialeah, FL
VOLUNTEERS STILL NEEDED
 - b. Business Lawyers in the Courtroom – Trial Skills for Minority Lawyers
October 1-2, 2015 @ Orange County Courthouse 425 N. Orange Avenue, Orlando, FL
Report from: Marian Doris / Roy Kobert
 - c. Central Florida Diversity Mentoring Picnic Central Florida Diversity Mentoring Picnic
January 2016 @ FAMU COLLEGE OF LAW, Orlando, Florida
SUBCOMMITTEE NEEDED

- d. Hillsborough County Bar Association’s Diversity Networking Social for Law Students
February 2016 @ Chester H. Ferguson Law Center, Tampa, Florida
SUBCOMMITTEE NEEDED
- e. N.E. Florida Minority Mentoring Picnic
March 2016 D.W. Perkins Bar Association/Jacksonville Bar Ass’n Diversity Committee @
Florida Coastal School of Law, Jacksonville, FL
SUBCOMMITTEE NEEDED

5. NEW BUSINESS

- a. Business Lawyers in the Courtroom: Trial Skills for Minority Lawyers
April 2016 Northern District
TASK FORCE NEEDED

- b. Scholar Program Initiative
(Joint Task Force with Membership Committee)

- i. Description of Program
- ii. Selection Process
- iii. Role of BLS Fellows as Mentors
- iv. Introduction of Inaugural Class of Scholars

- c. Relaunch of New and Improved Mentoring Program
(Joint Task Force with Membership Committee)

- i. Handbook
- ii. Mentors / Mentees Matching
- iii. Website
- iv. Marketing

- d. Selection of 2015/2016 BLS Fellows

- e. Minority Volunteer Bar Outreach
TASK FORCE NEEDED WITH BLS FELLOWS

- f. Other New Business

- 6. Executive Council’s Request: Potential for Creation of Task Force to Review Florida Business Statutes Post *Obergefell* (recognizing same sex marriage) – to make sure business statutes are now “gender neutral”.

- 7. Adjournment



Business Law Section of the Florida Bar

INCLUSION MENTORING FELLOWSHIP COMMITTEE

VOLUNTEER SCHEDULE FOR

KOZYAK MENTORING PICNIC

October 31, 2015

Amelia Earhart Park

TIME SLOT	NAME OF VOLUNTEERS	
11:30 a.m. to 12:00 p.m.	Rick Gross	James Moon
12:00 p.m. to 1:00 p.m.	Chris Broussard	James Moon/ Carlos Sardi
1:00 p.m. to 2:00 p.m.	Carlos Sardi	Robert Peters
2:00 p.m. to 3:00 p.m.	OPEN	Xinning Shirley Liu
3:00 p.m. to 4:00 p.m.	OPEN	OPEN
4:00 p.m. to 5:00 p.m.	OPEN	OPEN



Business Law Section of the Florida Bar

JOINT TASK FORCE OF THE MEMBERSHIP AND INCLUSION MENTORING FELLOWSHIP COMMITTEES

BLS SCHOLAR PROGRAM INITIATIVE

1. Goal and Objectives

- a. To have 2-4 law students from each of the twelve Florida law schools attend the BLS Labor Day Retreat each year as “ambassadors” of their respective law schools.
- b. To continue the Membership and Inclusion Mentoring Fellowship Committees’ efforts to infuse and capture a diverse group of future young lawyers to our Section by learning, mingling and socializing at the retreat and, hopefully, share a positive experience with others to encourage involvement and membership with the Section.

2. Qualifications and Requirements

- a. Scholars will be required to:
 - i. Attend at least two (2) substantive committee meetings; and
 - ii. Attend the Inclusion/Mentoring/Diversity Committee.
- b. Scholars may split their time and attend two committee meetings that meet during the same time period; however, it will count as only attending one meeting in regards to the requirement that you attend at least the three (3) committee meetings above.
- c. Scholars are also required to attend the Membership Committee/First Retreat Meet-n-Greet.
- d. Scholars must attend the above meetings in order to maintain their title as “Scholar” and receive their joint financial benefits from the Section and their respective law school.

- e. Scholars must provide feedback of their experience through their mentors within a week after the retreat.
- f. Scholars must enjoy themselves and, most importantly, also have a good time at the retreat.

3. BLS Fellow Mentors

- a. BLS Fellows, in addition to their other requirements in maintaining their two-year fellowships, will serve as mentors for the Scholars.
- b. BLS Fellows must attend “First Retreat Meet-n-Greet” to introduce themselves to their designated Scholar.
- c. BLS Fellows shall assist Scholars with their selection of the committees to attend.
- d. BLS Fellows shall guide the Scholars in all social events and networking, and ensuring that Scholars enjoy themselves and have a positive experience at the Retreat.

4. Budget and Costs

- a. Registration cost for each of the Scholars will be split evenly by Membership and Inclusion Mentoring Fellowship Committees. Yearly budget for the Program should be allotted for a total amount of no less than \$13,200.00 (\$275 x 48 Scholars) to be divided 50/50 by both Committees.
- b. Scholars will be responsible for securing their own travel and lodging arrangements, as well as all meals and incidentals not covered by the registration. Law schools will be encouraged, but are not required, to subsidize these costs for the Scholar ambassadors.



Business Law Section of the Florida Bar

[SAMPLE LETTER OF INVITATION FOR SELECTED SCHOLARS]

August __, 20__

[Scholar's Name]

[Address1]

[Address2]

[City], Florida [Zip]

Re: Scholar Initiative Program

Dear Scholar:

On behalf of the Membership and the Inclusion/Mentoring/Fellowship Committees of the Business Law Section of The Florida Bar, we are pleased to have you attend the BLS Annual Labor Day Retreat in Naples as one of our inaugural class of BLS "Scholars". Indeed, our respective Committees are more than happy to fund your registration cost for this event.

All we ask of our Scholars in return is that you commit to doing the following five (5) things:

1. First and foremost, enjoy yourself. Try not to be overwhelmed by the number of people you don't know. Remember, every friend starts out a stranger;
2. Second, select and attend at least two (2) substantive committee meetings (in addition to (1) the Membership Committee/First Retreat Meet-n-Greet which will meet on Saturday, September 5th, from 5:30 to 6 pm, and (2) the Inclusion/Mentoring/Diversity Committee, which will meet on Friday, September 4th, from 2 to 4 pm). Please visit our website at www.flabizlaw.org for more information regarding the various committees and see the attached Agenda for meeting times, as some committees, unfortunately, meet at the same time (if you are so inclined, you may split your time and attend two committee meetings that meet during the same time period, however, it will count as only attending one meeting in regards to the requirement that you attend at least three (3) committee meetings. We ask that you kindly advise us of your selections via email prior to the retreat;

3. Third, enjoy yourself. Mingling and socializing is an important part of your experience at the retreat. Simply put, you can never meet too many attendees;
4. Fourth, meet with your assigned “Fellow” to determine your involvement in at least one substantive committee;
5. Last, but not least, enjoy yourself! There is a time to work and there is a time to play. Retreat attendees find time to do both.

As a designated BLS Scholar, we are confident you will have an incredible and unforgettable experience at the BLS Annual Labor Day Retreat. We hope you will remain involved in the Section for years to come and, in the meantime, serve as an ambassador for the Section and share your experience with other colleagues at your law school.

Please do not hesitate to contact us if you should have any questions. We look forward to seeing you in Naples!

All the best,

Amir Isaiah, Esq., Co-Chair
Membership Committee

Carlos E. Sardi, Esq., Co-Chair
Inclusion/Mentoring/Fellowship Committee

Zach Hyman, Esq., Co-Chair
Membership Committee

James Moon, Esq., Co-Chair
Inclusion/Mentoring/Fellowship Committee

BLS

SCHOLAR

PROGRAM

INAUGURAL

CLASS

FSU

BLS SCHOLARS

Florida Bar

Business Law Section

Florida State University
College of Law



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yl14b@my.fsu.edu
305-815-6385



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The Florida Bar
Business Law Section
Member & Law Student
Mentorship Programs Handbook

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Mission Statement

The Business Law Section of the Florida Bar ("BLS") Mentorship Programs are designed to provide:

- Membership exposure, guidance and encouragement to members of the BLS who are recent law school graduates, newly practicing attorneys, or attorneys changing the scope of their practice; and
- Membership exposure, guidance and encouragement to law students interested in practicing business law in Florida and/or learning more about the BLS, and rendering assistance, when requested, in dealing with the rigors of the bar examination process.

in order to promote awareness, understanding, appreciation, and application of the principles of law including the importance of ethical conduct and professionalism. The court system, The Florida Bar, the BLS, and the public will benefit from this effort, as mentees gain greater insight into the practice of business law and both mentors and mentees become more involved with the BLS.

GOALS OF THE MENTOR - MENTEE RELATIONSHIP

The primary functions of the BLS Mentorship Programs are to promote involvement in the BLS and to provide meaningful insight into the various practice areas of business law in Florida.

A successful mentor is someone who is a good person first and a great lawyer second; someone who seeks knowledge and is guided by clear moral principles in both personal and professional levels. First and foremost, as a teacher, a mentor should also be a person who helps the mentee navigate the professional world and assists the mentee in making connections that will be valuable throughout the mentee's career. A mentor is responsible for managing mentor-mentee relationship, and should encourage the mentee to reach out with questions and for advice.

A successful mentee is someone who is motivated to be an exceptional lawyer, and who recognizes the need for constant improvement. The mentee must have love and respect for the profession, and should recognize that there is a human component to a lawyer's training which includes the kind of contact a true mentor can offer.

Mentors are given the opportunity to influence the way mentees interact with their colleagues and practice law, thus influencing the future of the profession. Mentees are given the opportunity to be molded by some of the finest business lawyers in Florida, in an atmosphere where candid yet confidential exchanges between the mentor and the mentee can take place.

Guidelines for Mentorships

A. Guidelines for Mentors:

A mentor must be a member in good standing of The Florida Bar and have been practicing law for a minimum of five (5) years (or less if approved by the Chair of the Section). The specific activities of a mentor will be guided by the curriculum found within this Handbook.

In order to facilitate a true mentor/mentee relationship, meetings or conferences should take place at least once every three (3) months. Generally speaking, the mentor should focus on facilitating the mentee's familiarity with and exposure to the practice of law and the BLS by:

1. Inviting the mentee to BLS events and introducing the mentee to the judiciary, court officials, and other lawyers and members of the BLS.
2. Providing a sounding board for the mentee to discuss practice and career related issues.
3. Advise the mentee on business development skills and tactics.
4. Assist the mentee in navigating the pitfalls and internal politics associated with practice in a law firm.
5. Providing law student mentees with pre-career guidance and counseling, including dealing with the rigors of bar examination preparation.
6. Introducing the mentee to the judiciary, court officials, and other lawyers and members of the BLS.

A mentor's role should introduce the mentee to business law (and specialized areas within business law), and to encourage participation in the BLS. The goal of the BLS Mentorship Programs is to facilitate an exchange of ideas, experiences and knowledge. Mentors should share their stories with mentees to help them both feel more comfortable with and learn from the mentor's good and bad experiences.

Both the mentor and mentee are cautioned that they should take appropriate steps to avoid even the appearance of the existence of any attorney/client relationship with each other's clients. Mentors and mentees

should keep in mind, and remind each other of the importance of client confidentiality, applicable privileges and client conflicts. Mentors and mentees should also remind each other that any detailed conversation about the specifics of a problem and/or situation involving a client might require prior consent from the client before making such disclosure. This also applies to any discussion or presentation of specific facts through hypotheticals in which the identity of any client is concealed.

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. Likewise, 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. In no event shall the mentor be held liable for advice provided.

Although the mentoring relationship is a resource to enhance the mentee's professional development, it is not an internship, externship, or clerkship, and should not be treated as such. Any employment opportunities between a mentor and mentee are and should be kept completely outside of the BLS Mentoring Program. Although a mentor/mentee relationship may lead to the mentee's employment, the mentorship program is not intended to assist any mentees in obtaining any employment.

Ultimately, through the mentoring relationship, it is expected that all participants will enjoy enhanced career success, a greater realization of the importance of service to the community and the profession, and a consistent effort toward the ethical and competent practice of law.

B. Guidelines for Mentees:

In order to facilitate the effective and efficient realization of the BLS Mentoring Programs' goals, mentees should be available to meet and/or confer with their mentors every three (3) months. Such meetings should be held in person whenever possible. The mentee is expected to prepare for meetings with the mentor by preparing specific questions and/or issues to raise and discuss during mentoring meetings.

The mentee should recognize that any disclosure of the specifics of a problem or situation might implicate the attorney-client privilege and confidentiality obligations prescribed by the Rules of Professional Conduct of the Rules Regulating The Florida Bar. Mentees are encouraged to inquire of and discuss with mentors the importance of client confidentiality and client conflicts.

Mentees should make their best effort to pose questions or inquiries to avoid disclosing client identities and to avoid any potential conflicts of interest, bearing in mind however, that disclosure of specific factual situations may have ethical implications. Mentees are encouraged to ask questions regarding substantive, practical, and ethical issues which they may encounter, regardless of how elementary the mentee might view the inquiry. Mentors and mentees should recognize that there is no such thing as a stupid question.

Mentees are expected to treat mentors with customary professionalism and respect. Although mentors will work to make themselves available to advise mentees as needed, mentees must exercise consideration and discretion regarding the use of the mentor's time. Ultimately, it is envisioned that the mentoring relationship will result in significant enhancement in the mentee's character, competence, and commitment to the ideals of the legal profession. A mentee who is open and eager to receive ideas on the practice of law will enjoy the greatest success and benefit from the mentoring relationship.

PROCEDURES

1. BLS members who a) are members in good standing of The Florida Bar, and b) have practiced law for a minimum of five (5) years (or less if approved by the Chair of the BLS), may volunteer to serve as mentors through the Program. To register, mentors must complete the registration form contained in this Handbook. Mentors may also access the registration form through the BLS website (www.flabizlaw.org). The BLS Mentoring Committee will pair the mentor with a mentee.
2. BLS members who a) are members in good standing of the Florida Bar, and b) have practiced business law for less than five (5) years (or more if approved by the Chair of the BLS), may apply for a mentor through the Program. To apply, member mentees must complete the registration form contained in this Handbook. Member mentees may also access the registration form through the BLS website (www.flabizlaw.org). The BLS Mentoring Committee will pair the member mentee with a mentor.
3. Law students who a) are enrolled in an accredited law school, and b) register as student members of the BLS, may apply for a mentor through the Program. To apply, law student mentees must complete the registration form contained in this Handbook. Law student mentees may also access the registration form through the BLS website (www.flabizlaw.org). The Chair of the BLS will review the application and, if approved, the BLS Mentoring Committee will pair the law student mentee with a mentor.
4. It is the mentor's responsibility to make initial contact with the mentee and to establish a regular meeting schedule amenable to both. A curriculum of issues to be addressed, as appropriate (depending on whether the mentee is a BLS member or a law student) is contained within this Handbook.
5. It is recommended that the mentoring relationship be continued for a minimum of one year. Informal extension of the relationship which may naturally occur is a matter solely between the mentor and mentee.

BLS MENTORSHIP PROGRAM: MENTOR REGISTRATION FORM

Name: _____

Email: _____ Phone: _____

Practice Area(s): _____

Years Practicing: _____ Florida Bar No.: _____

Hobbies or Interests: _____

___ I am interested in mentoring a new business lawyer who practices in the following area(s):

- | | |
|--------------------------|--------------------------|
| a) Business Litigation | b) Bankruptcy/UCC |
| c) Antitrust | d) Intellectual Property |
| e) Business Transactions | f) Tax Law |
| g) Employment Law | h) Other _____ |

If you would like multiple mentees, please indicate how many: _____

___ I am interested in mentoring a law student from the following program(s) (circle all that apply): Ave Maria, Barry University, Florida A&M University, Florida Coastal, Florida International University, Florida State University, Nova Southeastern University, St. Thomas University, Stetson University, University of Florida, University of Miami, Other _____.

who is interested in the following type(s) of business law (circle all that apply):

- | | |
|--------------------------|--------------------------|
| a) Business Litigation | b) Bankruptcy/UCC |
| c) Antitrust | d) Intellectual Property |
| e) Business Transactions | f) Tax Law |
| g) Employment Law | h) Other _____ |

If you would like multiple mentees, please indicate how many: _____

I certify that I am a member in good standing of The Florida Bar and will abide by the policies set forth in the BLS Member & Law Student Mentorship Programs Handbook.

Signed: _____

Name (Print): _____ Date: _____

BLS MENTORSHIP PROGRAM: MEMBER MENTEE REGISTRATION FORM

Name: _____

Email: _____ Phone: _____

Former Practice Area(s): _____

Current Practice Area(s): _____

Geographical Location: _____

Years Practicing: _____ Florida Bar No.: _____

Hobbies or Interests: _____

I am interested in being mentored by a BLS member who practices in the following area(s): (circle all that apply)

- | | |
|--------------------------|--------------------------|
| a) Business Litigation | b) Bankruptcy/UCC |
| c) Antitrust | d) Intellectual Property |
| e) Business Transactions | f) Tax Law |
| g) Employment Law | h) Other _____ |

I certify that I:

___ Am a member in good standing of the Florida Bar; and

___ Have not practiced business law in Florida for more than five (5) years or have been approved by the Chair of the BLS to be a mentee,

and I will abide by the policies set forth in the BLS Member & Law Student Mentorship Programs Handbook.

Signed: _____

Name (Print): _____ Date: _____

BLS MENTORSHIP PROGRAM: LAW STUDENT MENTEE REGISTRATION FORM

Name: _____

Email: _____ Phone: _____

Law School Attending: _____

Current Law School Level (please circle one): 1L 2L 3L

Anticipated Geographical Practice Area (if known): _____

Hobbies or Interests: _____

I am interested in the following area(s) of business law: (circle all that apply)

- | | |
|--------------------------|--------------------------|
| a) Business Litigation | b) Bankruptcy/UCC |
| c) Antitrust | d) Intellectual Property |
| e) Business Transactions | f) Tax Law |
| g) Employment Law | h) Other _____ |

I certify that I:

___ Am a second (2L) or third (3L) year law student enrolled in an accredited Florida law school; and

___ Am a student member of the BLS or have enclosed my application for student membership in the BLS (together with any applicable fees),

and I will abide by the policies set forth in the BLS Member & Law Student Mentorship Programs Handbook.

Signed: _____

Name (Print): _____ Date: _____

Member Mentoring Curriculum

I. Substantive Legal Mentorship

- A. Essentials of the Practice (to be determined by the mentor within the practice area chosen)
 - 1. Common Legal Principles and New Developments
 - 2. Research
 - 3. Oral Advocacy
 - 4. Effective Legal Writing

II. Character

- A. Professionalism:
 - 1. Relations with other lawyers (including associates, co-counsel, and opponents)
 - 2. Local procedures and customs/"unwritten rules"
 - 3. Civility, integrity and judgment
- B. Ethics:
 - 1. Engaging in business with clients
 - 2. The duty to report ethics violations
 - 3. Recognizing professional limitations
 - 4. Communication
 - 5. Fees
 - 6. Confidentiality
 - 7. Conflicts of interest (current and former client)
 - 8. Trust account procedures and obligations
 - 9. Candor
 - 10. Fairness to opposing party and counsel

- C. Obligations to Clients
- D. Obligations to The Bar
- E. Obligations to The Court
- F. How to Identify Conflicts
- G. Balancing Life and the Practice of Law
- H. The Humane Approach to the Practice (financial and non-financial rewards)
- I. Self-Help Awareness (Florida Bar programs addressing substance abuse, Florida Lawyers Assistance, etc.)
- J. Confidentiality
- K. The Bar Disciplinary System

III. Competence

- A. Office Procedure and General Orientation:
 - 1. Office economics:
 - i. practical aspects (such as overhead, etc.)
 - ii. billable hours and time management
 - 2. Office technology:
 - i. availability of valuable resources/books
 - ii. office supply source availability
 - iii. computers (hardware and software)
 - iv. internet
 - 3. Hiring support staff
 - 4. Locating an office
 - 5. How to collect fees/retainers
- B. Where to go to seek assistance (SCOPE, fellow attorneys)

C. Courtroom Decorum

D. Courthouse Orientation:

1. If relevant, escort mentee to courthouse and introduce him/her to members of judiciary

E. Courthouse Procedures

F. Non-Courtroom Decorum and Practices:

1. Public addresses
2. Advertising
3. Dealing with adversaries
4. Dealing with clients
5. Alternative dispute resolution(s)
6. Establishing fees
7. Accepting/selecting cases and clients (how to say "no")

G. How and When to Refer and Accept Referrals

H. Organization of Files and Records

I. Handling Trust Accounts and Client Funds

J. Sources of Business and Their Cultivation/ Marketing

K. Importance of Attention and Responsiveness to Clients

L. Continuing Legal Education

M. Real Life Experiences/War Stories

N. Evaluating Cases

O. Malpractice.

IV. Commitment

A. Pro Bono Work

B. Florida Bar Involvement

C. Business Law Section Involvement:

1. Meet at mentor's law office for introduction to other lawyers there
2. Attend a BLS meeting together
3. Introduction to other lawyers in the community and BLS members

D. Community Activism

E. Duty to The Bar

F. Obligation to Give Back to Community

V. Dealing with the rigors of Bar examination preparation

Law Student Mentoring Curriculum

I. Substantive Business Law Principles

- A. Essentials of the Practice (to be determined by the mentor within the business law area of interest)
 - 1. Common Practice Strategies
 - 2. "Unwritten" Rules of Practice
 - 3. Geographical Considerations

II. Practice Considerations

- A. Law Firms
- B. Solo Practice
- C. Where to go to seek assistance (SCOPE, fellow attorneys)
- D. Sources of Business/Cultivation
- E. How and When to Refer and Accept Referrals
- F. Importance of Attention and Responsiveness to Clients
- G. Real Life Experiences/War Stories

III. Character

- A. Professionalism:
 - 1. Relations with other lawyers (including associates, co-counsel, and opponents)
 - 2. Civility, integrity and judgment
- B. Ethics:
 - 1. Engaging in business with clients
 - 2. The duty to report ethics violations
 - 3. Recognizing professional limitations
 - 4. Communication

5. Fees
6. Confidentiality
7. Conflicts of interest (current and former client)
8. Trust account procedures and obligations
9. Candor
10. Fairness to opposing party and counsel

C. Obligations to Clients

D. Obligations to The Bar

E. Obligations to The Court

F. How to Identify Conflicts

G. Balancing Life and the Practice of Law

H. The Humane Approach to the Practice (financial and non-financial rewards)

I. Self-Help Awareness (Florida Bar programs addressing substance abuse, Florida Lawyers Assistance, etc.)

J. Confidentiality

K. The Bar Disciplinary System

IV. Commitment

A. Pro Bono Work

B. Florida Bar Involvement

C. Business Law Section Involvement:

1. Meet at mentor's law office for introduction to other lawyers there
2. Attend a BLS meeting together
3. Introduction to other lawyers in the community and BLS members

D. Community Activism