
YOUNG LAWYERS SECTION
OF THE ORANGE COUNTY BAR ASSOCIATION
SCHOLARSHIP COMMITTEE

I. Project Description

The Young Lawyers Section of the Orange County Bar (YLS) in Florida presents an annual scholarship to a deserving Orange County high school graduate who demonstrates financial need and has overcome personal adversity. This presentation will provide you a blueprint for creating a scholarship program in any market, large or small. Seven Orange County high school students have benefited from this program. Even if you never develop a scholarship program, this presentation will provide you with multiple fund-raising ideas for other projects.

II. Project Planning/Development

A. Identification of Need

Beginning with the adoption of a resolution in 1991, the YLS has recognized a need for college funding. A group of then young lawyers, now established bar leaders, realized that they could pool their resources and create a lasting program for prospective members of the section. The concept was to fund scholarships to honor local high school students who showed significant need. Several activities are undertaken each year to fund the scholarship, including a golf tournament, a dinner with members of the judiciary and a talent show. The needs fulfilled by this program are two-fold. First, it provides a much-needed scholarship to a local high school student. Secondly, as an unexpected and unforeseen benefit, the scholarship has created fun and lasting activities for our members to plan, organize and implement.

B. Determination of Project Goals and Design

1. Decisions to be made

a. Options - Project Goals

The goal of the YLS scholarship program is to fund scholarships for local high school students who present a financial need and have overcome personal adversity. A distinction was made at the onset to exclude those individuals who could obtain funding from other scholarships or grants, financial need being one of the definitive factors in awarding an applicant a YLS scholarship. Course of study is irrelevant, and the scholarship amount is \$1,500 per year, which has been estimated to cover books and tuition at the state institutions. Local affiliates should explore what needs

are not being met in local communities and tailor their scholarship program to fill those needs.

b. Options - Project Design

There are three major components to creating a scholarship fund: (1) determining the criteria for your scholarship and its potential applicants; (2) fund raising; and (3) selecting your recipient. The first component is essential at the beginning and then is evaluated periodically. Components two and three are ongoing.

2. Decision-Making Process

Initially, the idea of creating a local scholarship program needs to be approved by your YLS board members or officers, since it will have a profound and lasting impact on the organization. Their support and commitment, even after they have aged off, is essential. The good news is that the program will probably receive strong support from the senior bar members as well as the non-lawyers in your community. Each fund-raising activity should have a separate chair or chairs. A board member or executive member should be assigned to oversee each activity and be prepared to implement it if there are insufficient volunteers. A separate scholarship committee should be created to organize the selection process and monitor the scholarship participants.

3. Considerations in Project Planning

a. Community Resources

For Orange County's project, the single most important community partner has been Valencia Community College. Valencia has an established scholarship foundation that manages the YLS scholarship's funds. With Valencia's assistance, matching state funds were obtained thereby substantially increasing the amount of our annual contributions. To qualify for these funds, applicants are required to attend Valencia Community College for two years and the state university of their choice for the final two years. Local affiliates should develop a working relationship with a local law school, university or community college to assist with fund management issues and to maximize the amount of contributions that can be obtained from other government sources. Most educational institutions will have departments dedicated solely to administering scholarship funds. Alternatively, you may opt to independently manage the funds with the assistance of an investment advisor. However, such advisors may charge a fee for administering your fund and may lack the knowledge to actively and aggressively pursue government educational grants or programs.

The golf tournament and dinner with the judiciary fund raisers rely upon sponsorships from law firms, court reporter services, process servers, legal research providers and other companies which may have attorneys as their clients.

b. Personnel

Initially, to create the scholarship program you will need an exploratory committee to research the needs of your community and identify a potential partner. The number of individuals required for the year-to-year ongoing activities will vary by affiliate. As a guide, the OCBA has three year-round committees dedicated to the scholarship program. The scholarship committee has a chair and approximately 10 to 15 volunteers who assist with the selection process. The golf committee has a chair and 5 to 10 working members of the committee, including subcommittees. In addition, about a half dozen volunteers are recruited for the day of the tournament. The Dinner with the Judiciary committee requires a chair and 10 to 15 committee members. Typically, volunteers and committee members do not participate in more than one committee.

c. Revenue Availability/Fund-raising

The main requirement for establishing a scholarship program is developing effective and successful fund raisers. Three ideas for fund raisers are considered below, but any fund raiser can be used, regardless of the amount raised.

- (1) **Talent Show** - A talent show requires volunteer performers for a variety of skits that may include comedy, drama or musical entertainment. The performers are typically amateurs, and prizes are awarded to the top acts. A talent show will require the rental of a host facility, typically a centrally located bar or eatery. Tickets should be sold in advance, although most sales will be at the door the day of the event. Costs per person should vary depending upon the food and beverages provided. A \$5 to \$10 contribution can be requested. Law firms are also solicited to provide financial sponsorships. Partners from local firms serve as judges. Door prizes can consist of gift certificates to local restaurants, and are raffled during the intermission. The OCBA no longer sponsors a talent show. A determination was made that the time spent and number of volunteers required to organize this fund raiser were overwhelming. However, several thousand dollars were raised at these events which were highly effective in promoting the organization and the scholarship program.
- (2) **Dinner with the Judiciary** - A cocktail reception and dinner for the members of the judiciary can serve as a good fund raiser. Each

judge is assigned a key attorneys who serves as host for the event. Key attorneys consist of volunteer young associates and are easily recruited. A speaker for the event will usually waive his or her fee in the interest of assisting the fund-raising efforts. The meal and other accommodations are provided from the funds collected. The price per ticket will vary with the type of meal provided; however, to insure good participation, it should not be much higher than the actual cost of the meal. Judges from all circuits are invited to attend. The majority of the funds raised come from law firm sponsorships. To encourage smaller firms to participate, minimum sponsorships are based on the size of the firm. Sponsors are recognized in a formal program, and the funds raised are used to provide judges with a complimentary meal. The event is effective in that it provides young attorneys with a unique opportunity to interact with local judges. The OCBA has raised about a thousand dollars per event. This year's dinner went casual with an outdoor bar-b-que theme and no speaker. The casual atmosphere allowed attendees to mingle and talk in a more relaxed setting.

- (3) **Golf Tournament** - A golf tournament is highly profitable because there are set costs per player. Therefore, regardless of the number of participants, a profit is always expected. The first requirement is to select a good course. Criteria to consider include: the cost of the course per player; the distance of the course from the downtown area; and the course's exclusivity or brand name recognition. In selecting the course consider that the more exclusive and glamorous the course becomes, the more likely you will price young lawyers out of the event. Law firms participate by supplying foursomes and hole sponsorships. Rates can vary, but as a guide the OCBA golf tournament charges \$500 for a foursome of golf and \$250 for a hole sponsorship. Some firms use the golf outings as client recruitment opportunities, others as a reward for young associates. Prizes are awarded to the top foursomes, the closest to the pin and the longest drive. Prizes may be purchased or solicited from other area golf courses. In addition to the entry fees and hole sponsorships, monies are raised the day of the tournament through the sale of raffle tickets and mulligans, strings, sand saves and other score-reducing gimmicks. Prizes for the raffle items are solicited prior to the tournament and are obtained for little or no cost. In recent years, each annual golf tournament has raised in excess of \$12,000.
- (4) **Other Fund-raising Ideas** - Other ideas for fundraisers: a tennis tournament, a chili cook-off, a bowling outing or a theme party. Firms also enjoy sponsoring receptions, particularly if it will introduce young associates to other bar members in the

community. Consider sponsoring a fund-raising reception for the law clerks during the summer months and for new members of the bar in the fall. In addition, each fund raiser should be used to recruit new members to join the bar association and to increase community awareness of the scholarship program's mission.

d. Other (Equipment/Physical Needs)

No special equipment is needed for any of these functions, but the choice of location of each fund raiser is vital. For scholarship application interviews, consider using a law firm's conference room or school classroom.

III. Implementation . . . How to Replicate This Project

A. Timetable

Developing a fully funded scholarship program is ideally a long-term project; however, it is certainly possible to begin awarding scholarships within 12 months of inception.

Month 1

1. Establish an exploratory committee to assess what types of individuals in the community need financial assistance. Determine the age and the criteria for the prospective recipients.
2. Select one grand fund raiser. Multiple smaller fund raisers may also be effective, but initially concentrate the organization's efforts on one larger event.
3. Assign a chair to the fund-raising event.

Month 2

1. Approve the type of scholarship to be awarded (i.e. law student, other college student, community college, etc.). Establish a permanent scholarship committee and appoint a chair. The individual considered as the first-time chair should have intimate knowledge of the organization's structure and should be expected to chair the scholarship committee for the first two years to provide continuity.
2. Set a time, date and location for the first scholarship committee meeting. Provide as much detail as possible as to the purpose and goal of the scholarship.
3. Set a time, date and location for the first fund-raising committee meeting. To increase interest and participation, name the committee after the type of event and avoid the term "fund raiser" in the name. If possible, consistently schedule the meetings on the same days of the week and at similar times. After-hours meetings at a local establishment or law office may work better than a lunch meeting.
4. Publicize the committee meeting at a luncheon or through other traditional means such as an e-mail or by reference in the organization's newsletter.

Month 3

1. At the first scholarship meeting, select the specific college or law school that will benefit from the organization's scholarship.
2. Determine the amount of the first scholarship.
3. Determine the number of scholarships to be awarded in the first year.
4. Determine the frequency of the scholarship. Assess whether the recipient will receive a one-time award or will receive a recurring award every semester or every academic year.
5. Establish a realistic projection of the amount to be raised in the first year.
6. Determine if the applicants will be interviewed by the scholarship committee or whether the educational institution will select the recipient.
7. Establish a dean or other administrative officer of the educational institution as a contact person to serve as the committee's liaison. If possible invite that contact to the second meeting or any subsequent scholarship meetings.
8. The fund-raising committee should establish a list of potential sites.
9. Consider tentative dates and times for the event. Plan the first event no earlier than four to six months from the date of the first meeting to allow for sufficient publicity.
10. Consider the date and times of other community events and bar activities. For example, if you are in a college town, never schedule a golf tournament the Friday before a big home football game.
11. If a list is not readily available from your local bar, assign a committee member to compile a list of all local firms in the area, including small firms and sole practitioners.
12. If there are sufficient volunteers, assign a committee member to compile a list of service providers to the legal community (e.g. court reporters, process servers, document reproduction companies, etc.).
13. If planning an event with judges, have a volunteer compile a list of all judges in the area including administrative, appellate and federal judges.
14. If planning an event for which a speaker is required, begin a list of potential candidates and assign several volunteers to establish contact with them. Determine their availability, their needs and the costs to have them attend.
15. Have each committee establish a time, date and location for future meetings. Try to hold at least one meeting per month and continue to recruit prospective committee members.

Month 4

1. If the organization is to select the scholarship recipient, create a scholarship application. Create an exhaustive list of questions and particularly those that address the goals and the mission of the scholarship. Determine if there will be a writing sample required.
2. Determine a deadline for the applications to be submitted. Establish the deadline at least three months prior to the start of the academic school year.
3. Assess if there are any matching funds or grants that can be obtained. Ask your educational liaison for assistance.

4. Select a site for the event. Consider factors previously discussed, particularly costs.
5. If a speaker is required, narrow your choices to a smaller group of candidates.
6. Narrow the list of tentative dates and times for the event based on the availability of the speakers or the sites.

Month 5

1. Finalize the scholarship application.
2. Continue to work on other sources of funding.
3. If the scholarship is to be awarded to an area high school student, develop a list of local high schools and guidance counselors. In an organization with sufficient volunteers schedule a day to visit those high schools with greater need and plan an education afternoon at which you can discuss the criteria for your scholarship with local students and guidance counselors.
4. The event committee should confirm the speaker or entertainment for its event and have a site reserved. Some sites may require a deposit. If the deposit cannot be postponed assign part of your budget or ask your senior bar for assistance.
5. Draft a solicitation letter to area law firms. Keep your letter to no more than two pages and include the pertinent information, such as the date, time and location of the event, sponsorship costs and most important, benefits to the law firm. Include incidental benefits such as recognition and prestige.
6. If possible, draft a similar solicitation letter to service providers. If conducting a golf tournament, offer them an opportunity to sit in on a hole and promote their services. A number of companies are willing to set up a table and provide giveaways including golf items, food, refreshments or other goodies. However, be sure to check with the golf course before offering such incentives.
7. If judges are to be invited, draft an invitation letter to the judges. Consider whether they will be invited to participate without charge or at a reduced fee. Also include the cost for additional guests they may bring.

Month 6

1. The scholarship committee should continue to work on publicizing the scholarship until the application deadline. See publicity below for some suggestions.
2. The event committee should begin to compile door prizes and raffle items. Most prizes are obtained through personal contacts; however, solicitation letters can also be effective.
3. Divide the list of law firms among the volunteers. Rely first on contacting individuals that are members of the bar association. Ask for sponsorships, but concentrate on establishing participants.
4. For the dinner with the judiciary consider assigning young lawyers as key attorneys to host the judges. The young attorneys derive a benefit in meeting area judges. The event benefits by having a core of individuals who will attend.
5. Begin publicizing the event.

Months 7-8

1. Continue to publicize the fund raiser.
2. Finalize details relevant to the event.
3. For golf tournaments, establish rules for prize winners, prizes to be awarded, etc.
4. For the dinner with judiciary, begin establishing the number of participants expected. Also, verify that the speaker has any special needs met, such as visual aids or special accommodations. If selecting a hotel as the site for a dinner, ask for discounted or reduced rates for the speaker's overnight stay.
5. Scholarship committee should begin to solicit volunteers for applicant interviews.
6. A selection committee may be assembled to reduce the number of applicants. Consider having 5 to 10 interviews in one evening.

Month 9

1. Have the fund raiser and have fun. Hopefully, the organizers will also enjoy the event.
2. Scholarship committee should schedule the first interviews after the fund raiser has occurred. The date of the interviews should be coordinated with the applicants at least several weeks in advance.
3. Note that the activities of the scholarship committee and the fund raiser do not need to coincide. Simply insure that the scholarship committee is aware of the amount available to be awarded.

Month 10

1. Assess the event's success and determine the total amount of money raised.
2. Establish what percentage of the funds will be used for future scholarships.
3. Send thank you letters to all sponsors and special guests, such as speaker, entertainer or master of ceremonies.
4. Scholarship committee should finalize its interviews and select its candidate. Alternatively, the scholarship committee may submit a recommendation or recommendations to the organization's governing board which then has the final decision-making authority.
5. Contact the award winner and send letters to all applicants, particularly those interviewed.
6. Contact the educational institution and make arrangements to transfer the funds.

Months 11-12

1. Invite the recipient to an organizational lunch and present the scholarship in a formal setting.
2. Publicize the event and document the presentation ceremony for future publicity opportunities.
3. Maintain contact numbers and addresses for the scholarship recipients to track their academic achievements and the success of the scholarship program.
4. Take time off before commencing the cycle all over again.

B. Recruitment and Training of Volunteers

No specialized skills or fund-raising knowledge is required to organize these committees.

C. Publicity

Aggressive publicity of the scholarship program and any fund raisers should be undertaken to insure that fund raisers sell out and to maximize the amount of monies raised. Keep in mind that some ideas may be cost prohibitive. The following are some methods used by the OCBA to promote its events:

1. Place notices in the local bar briefs or newsletter.
2. Include flyer inserts in the local bar briefs.
3. Distribute flyers at bar association meetings or lunches.
4. Solicit free community service announcements from the local media.
5. Use a list serve to send mass e-mails to members of the bar association.
6. Send letters to managing partners at law firms soliciting young associates as volunteers for scholarship or event activities.
7. Make announcements at other community organizations.

D. Day-to-Day Operations

A scholarship program requires the organization's treasurer to maintain a separate accounting for the funds raised. Creation of a scholarship foundation or a 501(c)(3) organization provides greater fund raising opportunities, but also adds administrative responsibilities.

IV. Evaluation and Impact

The scholarship program has had tremendous success since its inception. More than \$160,000 is currently in the foundation. In the past six years, seven students have been awarded annual scholarships in the amount of \$1,500 per year. Several prior recipients have completed their education and obtained college degrees. All of the recipients have been selected on the basis of the need they have demonstrated and the additional difficulties they have had to overcome to attend college.

The program has also had a monumental impact on the organization. Hundreds of young lawyers have been active participants on the various committees. Many of the committee chairs have later become board members or are current members of the senior bar's executive committee. The events and activities continue to foster and create new leaders and encourage others to participate in social events. The scholarship fulfills a need in the community and simultaneously provides the organization with a worthwhile service endeavor.

V. Bibliography/Other Resources

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