

# James Otis Lecture Series Event Coordinator Toolkit

James Otis Jr. (1725-1783)



## Introduction

The American Board of Trial Advocates (ABOTA) is proud to present the James Otis Lecture Series, a national ABOTA initiative that plays out locally each September. The goal of the series is to inspire and educate young people about the United States Constitution, help schools fulfill the federal requirements of presenting an educational Constitution Day program, and allow ABOTA members and chapters the chance to get involved with and reward some of the best and brightest students in their regions, states, counties and communities.

ABOTA created this toolkit to help interested members and chapters host a successful James Otis Lecture Series event. It provides information, suggestions, templates, checklists and guidance designed to help you plan and implement a local event from start to finish. Included you will find materials on the following topics.

- Overview of the James Otis Lecture Series and Constitution Day
- Selecting an event format
- Selecting a venue
- Securing speakers and selecting a lecture topic
- Coordinating with schools (sample invitation document available separately)
- Publicizing the event (sample media advisory, news release and program documents available separately)
- In-classroom format specifics
- Planning tasklist (sample document available separately)

Much of the guidance found in this toolkit is based on the first-hand lessons learned and experiences of ABOTA members who have successfully hosted these events in the past and offered their wisdom during its development. We thank them all for their support and notes from the front lines of the James Otis Lecture Series.

If you are planning an event, please let the ABOTA national team know (1-800-779-5879). We would be happy to address any questions or concerns you might have and to help you make your event a success.



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## James Otis Lecture Series and National Constitution Day An Overview

Note: These descriptors can be used verbatim in event materials.

### *The James Otis Lecture Series*

The American Board of Trial Advocates (ABOTA) is proud to present the James Otis Lecture Series. Our lecture program about the United States Constitution is designed to allow schools to comply with the requirements of the federal statute creating Constitution Day. This law requires all federally assisted schools, both public and private, to provide educational programs each year on or about the anniversary of the signing of the Constitution.

America has a long and proud history shaped by lawyers and judges who have made lasting contributions to the rule of law, to the process of self-government, and to the preservation of our precious individual liberties guaranteed by the Constitution. Over the years, many Americans have sacrificed their lives or suffered great personal loss to advance the cause of liberty. As part of our program, we acknowledge the great debt we owe to our Founding Fathers and to these patriots.

James Otis Jr. was arguably the most influential lawyer in early American history. According to John Adams, who was present at the time, Otis's eloquent argument presented in a Boston court room in 1761 challenging the British laws, known as the Writs of Assistance, lit the spark that led to the American Revolution. It was Otis who said, "A man's home is his castle." Otis challenged oppressive laws that permitted warrantless searches of homes and businesses. His arguments were a ringing reaffirmation of the Anglo-American belief that all men are born with certain natural and inalienable rights, which cannot be violated by any king, parliament, or other governmental authority. James Otis's famous court room presentation is captured in a sweeping mural painted by Robert Reid in 1901 in Nurse's Hall, part of the Massachusetts State House in Boston.

ABOTA created the James Otis Lecture Series to educate and inspire students across our nation so they will have appropriate knowledge of and respect for the United States Constitution. We are honored to have a number of noteworthy participants each year. Together with students representing high schools throughout the country, we celebrate this important and historic event. We congratulate our carefully selected students and recognize them as James Otis Scholars.



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### *Constitution Day*

On Sept. 17, 1787, 39 men gathered in Independence Hall in Philadelphia and signed the United States Constitution. What started in May of that year as an effort by several states' delegates to amend the Articles of Confederation, resulted, instead, in an agreement by the people of the United States to establish a wholly new government unlike any on Earth. Their expressed goal was to secure the blessings of liberty to themselves and to their posterity. Of the 55 delegates who participated in the Convention that hot summer, 32 were lawyers.

What they formed was not perfect. It was a document that spoke of liberty yet condoned slavery. It hinted at equality, yet gave disproportionate power to smaller states and slave states. It had an unworkable method of selecting an executive branch. Yet what was created after four months of debate, conflict and compromise resulted in a remarkable affirmation of the value of self-government and the rule of law. These principles have endured for more than two centuries.

Remarkable women and men have helped shape our government and preserve our liberties in that span. Many were lawyers. ABOTA hopes that the James Otis Lecture Series will help keep their memories and examples alive.



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## Selecting an Event Format

ABOTA members have had success implementing James Otis Lecture Series events of all shapes and sizes, ranging from a one-classroom presentation at a local high school to a statewide event at one of the most important locations in American history. Here are a few things to keep in mind as you decide on the size, scope and format of your event.

- **Basic event formats.** You should feel free to design the event that is right for your school(s) and students. As a starting point to design your event, below are two basic event overviews that have worked in the past.

Lecture Event	In-Classroom Event
<ul style="list-style-type: none"><li>• Emcee intro about James Otis and event</li><li>• 2 substantive speakers</li><li>• 1 ABOTA speaker</li><li>• Speaker Q&amp;A or panel discussion</li><li>• Possible elements that add to ceremonial nature of pageantry of the event, e.g., color guard, patriotic music, etc.</li><li>• Hand out James Otis Scholar certificates (or mail later)</li><li>• Light refreshments (before or after)</li><li>• Possible chapter luncheon or dinner honoring speakers</li></ul>	<ul style="list-style-type: none"><li>• Presenter intro about James Otis, Constitution and ABOTA</li><li>• Presenter leads lesson plan discussion</li><li>• Presenter facilitates student interactive activity</li><li>• Hand out James Otis Scholar certificates</li></ul>

- **Calendar time.** Consider the time span between when you begin planning and when the event will need to be, keeping in mind that Constitution Day, when these events are typically scheduled, falls on or about Sept. 17 each year (depending on the day of the week). Larger events, with more details, tend to need longer lead time to secure a venue and coordinate all event logistics, while smaller events don't require as much advance planning. Generally speaking, our experts recommend having the event on a Friday, midday (between 10 a.m. and 3 p.m.).



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- **Planner time commitment.** Consider the amount of time that you or your planning team have available to devote to planning the event. Though all events require old-fashioned elbow grease, larger-scale events tend to require more hours to plan and coordinate than small-scale events.
- **Your style.** Some people like to inch their way into a new challenge; others prefer to go in full-bore. If starting small, learning from the process, and sizing up next year conforms more to your style, that is something to keep in mind. If, however, you like to jump right in to the deep end and rise to challenges, a larger event could be just the ticket.
- **Connection to schools, speakers and spaces.** We explore each of these topics in greater detail later in this toolkit, but a quick thought about those three items up front may help you decide on the format that is best for your event. If you have specific connections already with schools or school systems, the nature of those connections may influence your decision. If you have a speaker in mind who is a big draw, you may consider hosting a larger event to accommodate the interest. You could also utilize your chapter members as the “speakers” to give a prepared in-class presentation or workshop instead of a traditional lecture. Finally, your event will be physically limited by the venue you select; if you have one in mind, that can decide the event format for you at the outset.
- **Additional flexibility.** Though ABOTA targets Constitution Day for this event series, some individual chapters have deviated from this day as needed to accommodate the needs and obligations of specific participants and to overcome other logistical obstacles. The date change did not compromise the effectiveness of the event. This is an option that can be considered, but keep in mind that the sample language in the media and program materials referenced in this toolkit will need to be modified if the event isn’t tied to Constitution Day.

An additional idea that can be considered with respect to the format is incorporating elements of other ABOTA educational programs into the lecture event, such as the Teachers Law School or the Justice by the People curriculum. Depending on the format and audience size you choose, there may be natural ways to include activities, materials or conversations covered in these other programs during your lecture event.

Keep an open mind, and you’ll find ways to make your event perfectly suited to your interests and your audience.



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## Selecting a Venue

Your venue will play a large role in setting the size and tone of your event. Here are a few things to consider as you select your location.

- **Historic locations.** Locations that have historic significance in your state or area are a good option for the James Otis Lecture Series event. Historic buildings or sites of historic events can set a reflective tone. They provide a tie to the sense of history of the series' namesake and the Constitution as well as offer an interesting and meaningful destination for the participants.
- **Courts or other judicial locations.** Courthouses and other similar buildings make good locations for this event. You or members of your chapter certainly have connections and a familiarity with the space that could make planning easier. Many students never have been to a courthouse, so it would be something out of the ordinary.
- **Law schools.** Law schools, or other college or university locations, are typically well set up for events of this nature. They have meeting spaces, theatres and lecture halls of all different sizes and typically have good signage, transportation and logistical solutions for the event. ABOTA relationships here may also be a big benefit, as some of our experts have been able to secure the law school space for free for an event. And most event experts suggest hosting the event over lunchtime or early afternoon on a Friday, when most law schools do not have any classes, so the campuses are a little emptier and easier to navigate for your participants.
- **High School Auditorium.** High school auditoriums and other similar event facilities on campus can provide suitable space for students and may alleviate any major transportation coordination. What they lack in historical or topical significance they make up for in convenience for students and event planners alike. Relationships that are established with school staff and administration members should simplify the scheduling and logistics process.
- **Virtual Venue.** Whatever actual venue you choose, consider setting up an online live stream of the event (and capturing the feed for later hosting on the chapter website) to include those interested participants who are not able to attend in person. Such a feed could benefit non-participating schools, teachers and students; interested members of the public; members of the media unable to attend; members of the sponsoring ABOTA chapter; and members of other ABOTA chapters interested in the event or planning their own in the future.



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- **Venue tour availability.** No matter the venue, you may consider looking into the possibility of arranging a tour of the venue for participants before the event. If participants are traveling from any sort of distance, it is likely that they and their chaperones will be taking the entire event day off from work and school to attend. Having a venue tour is a nice touch if that is possible, and will keep the participants occupied in the time leading up to the event.



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## Securing Speakers and Selecting a Lecture Topic

Choosing speakers and a topic for your lecture event go hand in hand. Either one may lead the other, or they can be generated simultaneously. Below is advice and insight from those who've planned successful James Otis Lecture events in the past on securing your speakers and selecting the lecture topic.

- **Two speakers.** Our experts are in agreement that two substantive speakers are perfect, plus one additional speaker to talk briefly about ABOTA as an organization (this person can be a local ABOTA person or someone from the national organization). Any additional speakers make the event too long; about two hours is the recommended program length.
- **Look to a variety of backgrounds for speakers.** Consider academics, historians, theologians, authors and judges as a start, as well as any other interesting individuals you may know or want to hear from. Our event experts recommend that you avoid inviting politicians to speak, as it may be too difficult for the audience to separate the party from the lecture content and lose the historical feel of the lecture to the here-and-now of politics. If you have a topic in mind, look for experts who can speak knowledgeably on that topic. Some of the event experts have established a board of directors of sorts for the annual event, comprising ABOTA members and high school teachers and administrators, to help brainstorm topic and speaker ideas.
- **Speaker compensation.** Many speakers are excited about the opportunity to speak to bright young people on a topic they are passionate about, and are willing to speak for free or for a minimal fee to reimburse their travel costs. Some of our event experts recommend giving speakers some token of appreciation, such as a plaque or hosting them for lunch or dinner after the event. One event expert hosts a dinner following the lecture event for the speakers and for ABOTA chapter members, with the dinner funded by a per plate cost for members.
- **Speaker bios.** Once you have your speakers identified, you'll want to get their bios (or resumes or CVs). You'll be including some biographical details about them in some of your publicity materials for the event, as well as in your introduction of them during the lecture.





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- **Timely and timeless topics.** For a timely lecture topic, consider any national or local events, milestones or observances that may be experiencing a milestone anniversary for the event year, e.g., key dates in state history, or anniversaries of important legal rulings or constitutional amendments, or key dates in the life or service of an important historical figure.

Listed below are just a few historical events that hit a milestone in 2011. Events like those below could serve as the basis of a theme related to the Constitution that could be a good topic for a lecture event.

- 1791 – Constitutional amendments 1-10 are ratified (220 years)
- 1801 – Thomas Jefferson becomes president (210 years)
- 1861 – Civil War begins (150 years)
- 1861 – States of Mississippi, Florida, Alabama, Georgia, Louisiana, Texas, Virginia, Arkansas, North Carolina, Tennessee, and factions of Missouri and Kentucky, vote to secede from the Union (150 years)
- 1861 – Confederate Constitution is ratified (150 years)
- 1951 – Constitutional Amendment 22 regarding presidential term limits is ratified (60 years)
- 1961 – Constitutional Amendment 23 regarding president and vice president voting rights for the District of Columbia is ratified (50 years)
- 1971 – Constitutional Amendment 26 regarding setting the voting limit at no higher than 18 is ratified (40 years)
- 2001 – terrorist attacks on Washington and New York (10 years)

Alternately, you could select a timeless, evergreen topic. Some of these topics have been used for previous James Otis Lecture events, others are based on core elements of ABOTA's mission and educational focus, and all are strongly recommended as relevant subject matter for this lecture series:

- the U.S. and/or state Constitution
- the history of the state's courts
- constitutional amendments
- the Bill of Rights (esp. 1<sup>st</sup> and 7<sup>th</sup>)
- civil rights
- the founding fathers
- the individual's role in democracy
- judicial independence
- separation of powers
- the spirit of compromise
- federalism/states' rights

One event expert noted that if you select an evergreen topic, you could host the event annually using the same program materials and speakers, if you'd like. Ideally your two speakers would address different aspects of the same general theme to provide the program with some consistency, though it's not necessary for the event to be a success.



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## Coordinating with Schools

As one of our event experts puts it, high school students who excel at football have a chance to play in the local professional football stadium, and those who excel at baseball have a chance to play in the local professional baseball stadium; we can provide the James Otis Scholars experience to those who excel at academics and character. As you coordinate with the school or schools participating in your event, here are a few things to keep in mind.

- **Importance of relationships with schools.** For this lecture event and any other educational outreach a chapter might conduct, establishing relationships within the educational system — with school boards, administrators at the district level (particularly those responsible for curriculum development), members of building administrations, government officials who oversee for education, etc. — is extremely beneficial. Relationships with these individuals will help streamline event and program coordination between local students and ABOTA, as well as put you in a better position to take advantage of opportunities with the schools that you might not otherwise have known about. If you have these relationships already, be sure to tap into them for this event. If you don't yet have these relationships, consider this planning process a great first step at establishing them.
- **The best audience.** The best student audience for these events are those who excel at academics and/or are leaders in their schools. That allows for the high-level experience and exchange we want to define this series. If you're coordinating directly with a school to come into a classroom, ideally you'd be talking to a group hand-picked by the school, or an upper-class, advanced placement or college credit government, history or civics class. If you are inviting your audience to an off-site location, our experts recommend allotting each school a specific number of slots to fill and having the school(s) identify the students that should be selected to attend.
- **Possibility of a pre-built audience.** It may be possible for you to find a pre-built audience, time and venue by working with a school or school system. One of our event experts learned from the local superintendent that every month there is a countywide student council meeting of 300 to 400 student leaders, for which the county was always looking to plan programs. This ABOTA member was able to present the lecture program during the council's September meeting.



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Another ABOTA member identified an existing program in the state that paired members of the legal community with high schools for educational experiences. This member was able to tap into that network and send ABOTA members into classrooms through existing channels, having each individual chapter member coordinate classroom logistics directly with individual teachers to present a short Constitution Day program, all under the James Otis Lecture Series banner.

Use your creativity like these ABOTA members. You may find other avenues to explore that can potentially take a lot of the legwork out of coordinating logistics for your program.



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- **Issuing invitations.** Many state government websites offer an Excel file of all public school systems that you can download and use as the basis for your mailing list. Or you may consider tapping into contacts you have within a particular school or school system to access a contact list. If looking at schools statewide, the large master list may be as deep as you go, sending an invitation letter to each district. If your potential audience size is smaller, such as a handful of schools, you may want to consider looking at the schools' websites to identify the best administrator(s) or teacher(s) to contact directly. A sample invitation letter for the event that you can personalize or use as inspiration for your own version can be downloaded [here](#).

Our experts recommend including some information with the invitation on the lecture topic, if already decided, to help provide the students some context for the program in advance that will make any interactive portions of the event — such as a panel discussion or question and answer session — richer for all involved.

- **Transportation, chaperones and other logistics.** If hosting an out-of-school event, our experts recommend providing information to invited schools and students about parking and transportation options at or near the venue, but otherwise leaving transportation up to the invited schools or students. Similarly, our experts recommend indicating in the invitation letter that students attend with either a parent or teacher as a chaperone. If there are other logistical items that participants need to know about in advance, such as venue security protocols (e.g., no bags allowed), day-of registration instructions, notes about the availability of food/refreshments or special instructions for/asks of attendees with special needs, remember to include those, as well, in the invitation or in communication (mail or on an event website) closer to the event date.
- **James Otis Scholars certificates.** A nice touch for the event is to officially proclaim during the event that all students selected to attend are James Otis Scholars, and to issue all of them a certificate. A sample of the James Otis Scholar certificate is available [here](#). You can either distribute at the event, or coordinate after the event to have them mailed to the participating schools.
- **Memento.** Some event planners have provided some sort of giveaway for the student participants, such as a pocket Constitution or a copy of a book written by a speaker. If relevant, that is something for you to consider. Pocket Constitutions can be purchased for a nominal charge through several organizations, such as the National Center for Constitutional Studies ([www.nccs.net](http://www.nccs.net)). The books can often be purchased in bulk direct through the book's publisher.



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## Publicizing the Event

Sharing the story about your event with media and the public is a great way to give it more reach and let more of your community members know about ABOTA and the work it does nationally and locally. Below are some thoughts and suggestions regarding publicizing your event:

- **Go online.** Put event details online on a chapter or state ABOTA website and social media channels, if possible. This will ensure that the invitees can find information and details about the event online if they need a reminder about logistics. It will also help provide an online footprint for members of the media who may be looking for more event details before or after the event.
- **Build a media list.** Generate a list of contact information for media who cover the event area (city, county or state) with whom you can communicate about the event. You can invite them to the event in advance using a media advisory and let them know more about the event on event-day using a press release (see points below).
  - **Brainstorm or research online for the news outlets** in your event area, which may include daily and weekly newspapers, community newsletters and news websites/blogs, talk radio stations, network TV affiliates, public access television stations, school district newsletters or publications, etc., as well as any legal or educational news magazines that are published in your community or professional networks. You'll find that some school districts also have their own television network that can provide additional opportunities to publicize the event and expand its reach; the district's communications or public information office can serve as a useful resource to help facilitate this opportunity, where available.
  - For each of those outlets you've brainstormed, **find contact information** — name, phone and email — for two to four relevant contacts by searching the outlet's website. You'll most likely be looking for reporters or editors in education, legal, metro or community sections. If listed, also add to your list an "assignment editor" (whose role in a newsroom is to assign stories to reporters) and a general contact, such as phone and email for the "news desk" or "new tips" (which are generic catch-all mailboxes that are scanned through for news ideas).
  - If you have any existing contacts at news outlets, such as personal relationships or reporters you've talked to previously for a news story, **add your personal contacts to your list**, as well. Even if they are not the most appropriate contact for this specific story, the fact that you know each other can be a good way to get some help getting your news idea in front of the right person.



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- **Invite media via a media advisory.** A media advisory is a standard-format document used to invite media to an event. About one week before your event (ideally before noon between Monday and Thursday), send your advisory via email to all of the contacts on your media list. If you have time, place follow-up calls to the news outlets about 48 hours in advance of the event, ensuring that the advisory was received and to see if the contact has any questions about the event.
- **Issue a news release the day of the event.** Issuing a news release is a great way to give reporters attending your event — as well as those unable to make it — details that will help them write a story about your event. In the days leading up to the event, customize the sample news release that can be downloaded [here](#) as part of this toolkit. On the day of the event (ideally just as the event is starting), send your news release via email to all of the contacts on your media list. Have some printed copies of the release with you at the event to hand to reporters who may be in attendance.
- **Coordinate photography or video.** Having a photographer and/or videographer on hand to capture the day's events is a good idea. Both provide several options for extending the useful life of the lecture throughout the year.

You can use the photographs for ABOTA publications and materials, and you can submit one or two good photos after the event to the outlets on your media list with a copy of the release (a welcome offering in many newsrooms that have ever-shrinking, overworked staffs). You can either hire a photographer, or enlist the help of a friend or chapter member with a nice camera to take photos for you.

As for video, some event experts have worked with public access television stations (identified in the “build a media list” section above) to record the entire event. The video of the lecture has then been aired on public access TV, giving more people a chance to see it. You can then purchase, or sometimes be given, a copy for your own reference. Still others recommend hiring a videographer, or enlisting the help of a friend or chapter member, to record the event so that video snippets can be put together for the chapter website or social media channels.

- **Event signage.** Simple but effective, consider having plenty of banners or signage at the event — and on the speaker's podium, if possible, with the ABOTA name and logo. This will help ensure that your organization gets acknowledgement in attendees' minds and in visuals for hosting the event.



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- **Notifying key third parties.** If there are other organizations or individuals whom you would like to be aware of the event, such as others in the legal community, you can consider sending them an email FYI along with a copy of the news release.
- **Coordinating with public information offices.** Many school systems, historical locations and courthouses have public affairs, public information or communications offices that publicize events for those entities as part of their daily job function. Consider reaching out to those individuals to coordinate on media outreach. School system public information or media relations offices may be a particularly good resource for you, as they have existing relationships with the education reporters in the area and would be happy to promote the participation of their students in an event like this. As mentioned previously, some school districts have their own education broadcast networks or have personal contacts with general education broadcast networks. Joining forces with these offices on outreach efforts can help supplement traditional outreach and expand the event's exposure to a broader audience. As part of this toolkit, you will find a sample news release that you can personalize and share with the school district to promote on its own letterhead and through its own media outreach channels.
- **Event programs.** Event programs serve both as an agenda for those in attendance, as well as a nice takeaway about ABOTA and the event. A sample program that you can personalize or use as inspiration for your own version can be downloaded [here](#) as part of this toolkit. The sample program is a single 8.5x11 page, double-sided, that can be printed from a standard office printer/copier.



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## In-Classroom Format Specifics

One or two ABOTA members in a classroom can be just as educational as a large-scale lecture event. Most items in this toolkit are geared toward lecture events of any size; this section addresses some of the specific needs of an in-classroom event. Here are a few things to consider if this is the format you select.

- **Choose a lesson plan.** There is no need to reinvent the wheel for a lesson plan for a Constitution Day in-school visit. There are many resources available for your use; simply look them over and decide which one(s) you like best. Here are a few places to look for your presentation materials.
  - Scholastic.org/AmericanJustice
  - JusticeTeaching.org
    - Select the Lessons link on the left-side menu (the Invaders activity is highly recommended)
  - iCivics.org/teachers
- **Interactivity is key in a classroom setting.** That is what is expected by the students and teachers, and the smaller audience will lend itself well to interaction.
- **Photos.** As with larger events, having a photographer on hand to capture the event is a good idea. Photos can be useful for publicizing the event throughout the year. You can use the photographs for ABOTA publications and materials, and you can submit one or two good photos after the event to local media with a news release (a welcome offering in many newsrooms that have ever-shrinking, overworked staffs). You can either hire a photographer, or enlist the help of a friend or chapter member with a nice camera to take photos for you. In most schools you also have access to student or district photographers who could capture the event for you.
- **Leave behinds.** A nice touch for an in-classroom event is to give the teacher James Otis Scholar certificates for all the students. A sample certificate that you can personalize or use as inspiration for your own version can be downloaded [here](#). You could also consider another small giveaway, such as pocket Constitutions, for all the students. These can be purchased for a nominal charge through several organizations, such as the National Center for Constitutional Studies ([www.nccs.net](http://www.nccs.net)).

