



Mentoring Plan Template for For Attorneys Raising and Caring for Families

NOTE: If you wish to delete activities or to add activities not listed, simply confirm with CAMP or with your Sponsoring Program facilitator, especially if you plan to apply for CLE Credit Certification.

1. Initial Planning Meeting, Personal and Professional Development (complete all)

Action	Mark completed items
Meet to prepare the customized mentoring plan based on the Mentee's needs and interests. Discuss best communication methods for each attorney, and consider scheduling all remaining meetings/activities for the mentoring term.	
In tailoring the mentoring plan to the Mentee's interests, discuss long-term career goals and identify ways to achieve them.	
The mentor should introduce the Mentee to the firm's attorneys and staff (if not already done).	
Include in the meeting professional identity discussion, including discussion about inclusiveness and diversity, work-life balance, mental health and substance abuse issues, and how the mentee identifies him or herself as a caregiver.	

2. The Colorado Bar and Legal Community (complete at least one)

Action	Mark completed items
Attend a Colorado Bar Association "Lawyers with Littles" event. Introduce the Mentee to other attorneys in attendance. Discuss the advantages of bar association involvement as a caregiver-lawyer and discuss the many local, state, and national associations available to the mentee.	
Attend an event hosted by Denver MAMA. Denver MAMA is devoted to furthering the interests of mother attorneys in the Denver metro area. MAMA offers support and encouragement for mother attorneys; opportunities to network, share experiences and solve problems for both career and home; and family-friendly activities.	
Discuss the benefits of the Colorado Lawyer Assistance Program (COLAP) and how it can be a resource to caregiver-parents who may need confidential assistance for any career challenge that interferes with the ability to be a productive member of the legal community; including but not limited to: Practice Management, Work/Life Integration, Stress/Anger Management, Anxiety, Depression, Substance Use, and Relationship Issues.	

3. History and Importance of Work-Life Integration

Action	Mark completed items
Meet together to discuss what work-life integration means to the mentee, including a self-assessment by the mentee as to whether they are effective work-life integrators.	

Discuss specifically how work-life integration fits in to the overall legal profession and the importance of said field.	
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4. Colorado Rules of Professional Conduct, Professionalism, and Civility

Action	Mark completed items
Required (to be completed with the activity elected from list below)	
The pair should discuss how attorney wellness corresponds with an attorney’s ethical and professional duties pursuant to the Rules of Professional Conduct and professionalism generally.	
Complete at least one of the following:	
Discuss how to screen for, recognize, and avoid anxiety and depression in practice. Include in your conversation a discussion of the Mentee’s duty to seek appropriate assistance with these matters and the resources available to the Mentee to address these issues should they arise.	
Discuss the responsibilities of the client and the lawyer in decision-making, the best ways to involve a client in their case when working on a part time, flex time, or remote basis. Discuss client communications generally and make a plan for effective and responsive client communication while maintaining work-life integration.	
Discuss appropriate ways to handle situations where a lawyer believes another lawyer has committed an ethical violation or otherwise acted unprofessionally or uncivilly; the obligation to report misconduct; and the appropriate way to handle a situation where the Mentee is asked by a senior member of the firm/organization to do something that is unethical, unprofessional, or not aligned with the Mentee’s concept of work-life integration.	
Discuss the grievance process and a lawyer’s duty to cooperate with a disciplinary investigation.	

5. The Mystique of “Flex Time” (complete at least two)

Action	Mark completed items
<p>LAW FIRM POLICIES</p> <p>Many firms will say they have alternative schedules, but do not have a written policy, which may reflect a lack of dedication on the part of the firm. Firms should have a specific written policy stating fair and steadfast guidelines that are available and more importantly, publicized, to all attorneys. If a policy is not addressed, attorneys will more than likely assume it is discouraged. It is important to ensure a policy is in place, rather than discovering options through informal networks, such as word-of-mouth.</p> <p>Discuss with the Mentee whether their firm has a written flex-time or alternative work arrangement policy. If not, discuss how the Mentee intends to take advantage of any unwritten or informal policy and whether the Mentee might successfully petition his or her firm to adopt a written policy.</p> <p>If a written policy does exist, discuss with the Mentee the terms of that policy and whether the Mentee will utilize the policy to improve work-life integration.</p>	

<p>GENDER & “THE MOMMY TRACK”</p> <p>Most people are aware that flexible scheduling is no longer only an issue with women, particularly in the field of law. Women are the growing majority in law firms and they may place just as much of an emphasis, if not more, on their careers. This allows men the opportunity to spend more time with their families, while not sacrificing the overall level of income the household receives. Men can be just as conflicted about their time away from home; they just tend to be less vocal about it.</p> <p>Many men, adoptive parents, and non-traditional families feel as though flex time policies are not available to them. Too often lawyers mistakenly believe that the “mommy track” is something reserved for women. If your Mentee identifies as a man or non-traditional parent or caregiver, discuss whether they view flex time in their firm as available to those other than traditional female mothers. Also address the Mentee’s fears and concerns in being a non-traditional user of the flex time policy and ways in which the Mentee can overcome those challenges to effectively benefit from flex time arrangements.</p>	
<p>ECONOMICS</p> <p>"I am afraid of receiving marginal work."</p> <p>Firms are always looking for rainmakers and value attorneys who have excellent client relationships. If you prove that you are an expert in your area, enjoy the practice of law and simply want to balance your lifestyle, firms will continue to provide you with challenging work. There are plenty of unproductive associates spending longer hours in the office, but not producing quality work. Attorneys who know your value and ability to handle sophisticated work will continue to bring you interesting and complex projects.</p> <p>"If I am part-time, I will blow my chances of one day becoming partner."</p> <p>Part-time partners or part-time attorneys on a partner track may be a rarity, but it's not necessarily because the firm won't allow it, but that many choose not to pursue it. With today's technology, firms realize attorneys don't have to be sitting behind their desk to be working. It is important to seek out firms that will be flexible, as long as you are also willing to be accommodating. In addition, firms recognize that a fair majority of attorneys requesting part-time positions are women. Most are focused on increasing their number of female partners and will work with them in an effort to keep them on track.</p> <p>Discuss with the Mentee whether they share these common fears about engaging in a flex time schedule and how they can overcome these fears and concerns to effectively benefit from flex time arrangements.</p>	
<p>TEAM WORK</p> <p>Resentment and isolation by their colleagues is a legitimate concern for attorneys who decide to work an alternative schedule. Aside from proving that you are still making a valuable contribution to the practice, it is really up to the firm itself to publicize its support and make it known that it is a viable option for everyone, not just a chosen few. For this reason, it is important that you are aware of your firm's commitment to this practice and ensure their support, from management on down.</p> <p>Discuss with the Mentee how to balance a flexible working arrangement with team goals and obligations. Include in your discussion, the benefit of working in teams vs. individually when it comes to maintain work/life integration and taking advantage of flexible working arrangements.</p>	

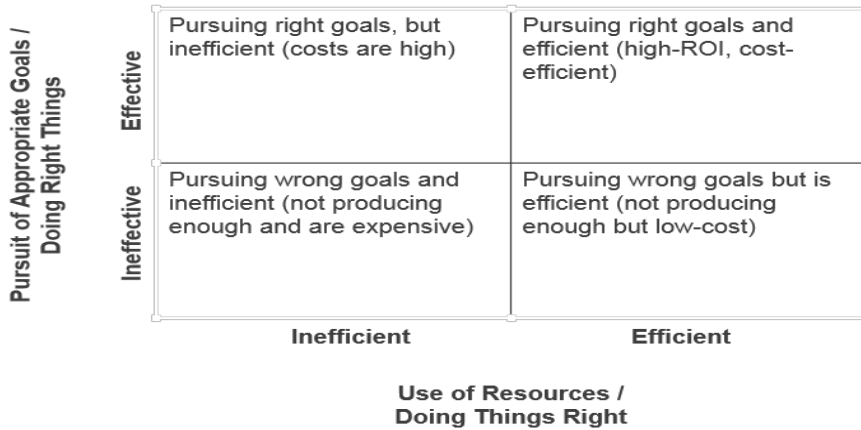
<p>BUSINESS DEVELOPMENT</p> <p>Clients increasingly have diversity requirements when it comes to selecting their counsel. As for the male/female ratio, clients recognize that flexibility equals higher morale which ultimately equals higher retention. Clients appreciate the "institutional knowledge" of their counsel and have no desire to continuously train new attorneys. In addition, many are supportive of reduced-hours or flex-time because, quite honestly, they notice little difference in the availability of their attorney. They realize attorneys are competent professionals who have no desire to ignore their client.</p> <p>Of course, a firm's main concern must be the bottom line, as it has to generate a profit in order to survive. Ultimately, you may not earn as much as some full-timers but that doesn't mean you're costing the firm money. All firms recognize the value of a long-term investment and how much money is spent training attorneys, only to have them leave and have another firm benefit. Again, client relationships, quality of work, and your mental health are more important than cutting back some hours during the week. Because longevity reaps many rewards, firms want to keep their attorneys happy and will bend to accommodate their needs.</p> <p>Discuss the mentee's business development concerns associated with flex time and create a business development and retention plan or strategy to assist the mentee in overcoming business and client development fears.</p>	
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6. Developing Professional Identity as a Caregiver Lawyer

Action	Mark completed items
Required	
<p>SHORT AND LONG TERM PROFESSIONAL GOALS</p> <p>The mentor and mentee should work together to define the mentee's short and long term professional goals. Included in this discussion should be aspirations of leadership in community and civic arenas, as well as in law practice. If the mentee has professional aspirations outside of the practice of law, those professional goals should also be discussed.</p>	
<p>SHORT AND LONG TERM PERSONAL GOALS</p> <p>The mentor and mentee should work together to define the mentee's short and long term personal goals. Included in this discussion should be family, travel, and wellness aspirations.</p>	
<p>ASSESSMENT OF CURRENT PROFESSIONAL & PERSONAL DEMANDS</p> <p>The mentor and the mentee should assess the current professional and personal demands on the mentee's time. The goal of the exercise is to help the mentee to better understand all of the minor and major strains on their time and resources and to accurately assess their current stress level. A helpful exercise includes a stress self-assessment offered at: http://www.stress.org/self-assessment/</p>	
<p>ASSESSMENT OF CURRENT PROFESSIONAL IDENTITY</p> <p>Ask the mentee to answer the question "what do you do" as a way to initiate the conversation about professional identity. Work with the mentee to expand the answer to the question to include a broader definition of the mentee's strengths, interests, and professional passions.</p>	
Complete at least two of the following:	
<p>DEFINING "EFFICIENCY"</p> <p>What is the difference between effectiveness and efficiency?</p> <p>Effective (<i>adj.</i>) – Adequate to accomplish a purpose; producing the intended or expected result.</p> <p>Efficient (<i>adj.</i>) – Performing or functioning in the best possible manner with the least waste of time and effort.</p> <p>The difference between effectiveness and efficiency can be summed up shortly, sweetly and</p>	

succinctly – Being effective is about doing the right things, while being efficient is about doing things right.

Work with the mentee to evaluate the people, issues, and pursuits which take up the mentee’s time to (1) define “efficiency” and “effectiveness” for the mentee, and (2) determine whether those pursuits are effective and efficient for the mentee.



DEFINING PROFESSIONAL & PERSONAL “SUCCESS”

Work with the mentee to create a sustainable and fulfilling definition of professional and personal success for themselves. To assist in this discussion, follow the steps below:

Traditional Concepts of Success

Defining success may seem easy at first. When asked to define success, most people cite conventional ideas of success, such as achieving independence, attaining a position of power, or amassing wealth. Pop culture is filled with characters who have achieved one of these traditional goals for success, but who are unsatisfied with it, from Ebenezer Scrooge to Charles Foster Kane. These are hyperbolic illustrations, but they serve a valuable lesson about the illogical appeal of wealth and power. They're alluring goals, but they are often not actually what make people feel happy and fulfilled. It's impossible to set good goals unless you know which ones are going to truly make you happy. Figuring out what's truly important to you, and filtering out the influence of traditional concepts of success, is the first step to creating a goal structure and ultimately forging a path to that success.

Unconventional Definitions of Success

History is ripe with individuals who have earned great respect because they followed an unconventional path, usually inspired by an unconventional definition of success. To many of these entrepreneurs and mavericks, that level of respect doesn't matter because they've found ultimate satisfaction in the work they do on a regular basis.

Finding Your Definition of Success

You may find it difficult to define your version of success, and if you do, you aren't alone. Figuring out what your definition of success is early on is the best way to create goals that will result in true satisfaction--not just money or power.

Picture yourself with all the money and time you could ever want. What would you do? Would you help promote a specific cause? Would you pursue a certain hobby or try to solve a major problem in the world? How would you find satisfaction? If you can answer these questions,

<p>you may have just found your definition of success. If not, look outward for inspiration. Speak with your mentors to get their insights on what success is and what's most important in their lives.</p> <p>A Foundation for All Your Goals Once you've figured out what success means to you, you can build the rest of your goals from there. Usually, you'll have two or three primary goals that allow you to achieve your definition of success, each of those goals will have several smaller goals it depends on, and so on.</p> <p>The key to staying motivated in the face of adversity or unanticipated challenges is contextualizing those shortcomings. Your definition of success also dictates your definition of failure--you've only failed if you've given up on achieving success.</p>	
<p>VISIONING BALANCE & INTEGRATION Start by considering three principles: be real, be whole, and be innovative. To <i>be real</i> is to act with authenticity by clarifying what's important to you. To <i>be whole</i> is to act with integrity by recognizing how the different parts of your life (work, home, community, self) affect one another. All this examination allows you to <i>be innovative</i>. You act with creativity by experimenting with how things get done in ways that are good for you and for the people around you.</p> <p>Doing this means thinking and talking about what truly inspires you, whatever that might be. It requires figuring out how to take incremental steps that are under your control and that move you in the direction you want to go, while bringing others along with you. It's not easy but you can attain significant achievement in a way that fits who you are. <i>Your own way</i> is the <i>only</i> way that will work for you.</p>	
<p>SETTING LIMITS Work with the mentee to develop limits for work time and personal time. Help them to develop a plan to communicate those limits and address situations when those limits are violated.</p> <p>1. Know your values. Understanding your values helps you figure out where you'd like to set boundaries. In other words, by first knowing your values, you're able to then set up systems that help you get those needs met.</p> <p>2. Communicate clearly. Lay out your limits very clearly. For instance, if you don't want your colleagues and clients to contact you at all hours, "verbally tell them the hours you will be available for work-related conversations," said Julie de Azevedo Hanks, author of <i>The Burnout Cure: An Emotional Survival Guide for Overwhelmed Women</i>. In the same scenario, it's also important to figure out what constitutes an "emergency," and clearly communicate that as well.</p> <p>3. Bring up a boundary or violation right away. When their boundaries are violated, it's not uncommon for people to get upset, ruminate about the situation for days or weeks and then bring it up a month later. However, so much can transpire during that time that the person may not understand where you're coming from. Instead, "it's important to reinforce and exercise your boundary in the moment or very close to it." Because if you don't, it simply loses its power.</p> <p>4. Create structure. One way to create structure – and thereby establish a boundary – is to have an agenda. When setting an agenda, include a start and end time along with topics to discuss. Another way to create structure is to hold a meeting. For instance, let's say your co-worker has a habit of coming over to your desk for 30 minutes at a time to chat. Instead, suggest having a weekly 15-minute check-in.</p> <p>5. Set boundaries at home. For instance, you check email before dinner, and then put away your devices so you can spend the rest of the evening eating with your family, watching TV and reading bedtime stories to</p>	

<p>your kids. It's also important to have one day when you're completely offline, so you can replenish your mental, emotional and spiritual reserves.</p> <p>6. Focus on concrete explanations. When you're setting a boundary at work, it's not necessarily productive to talk from your personal perspective. Instead, frame your explanations in something concrete, in terms of how it's going to affect other projects, clients or your bottom line. Instead of turning inward and catastrophizing, turn outward. Engage your co-worker. For instance, you might say something like: "Tell me more about why you need this done." Doing so helps to diffuse your anxiety response, which sabotages your ability to think rationally. And it opens the door to negotiating a more reasonable and mutually beneficial option.</p> <p>7. Prepare for violations. It's helpful to visualize your boundaries getting crossed, and how you're going to handle those situations. For instance, imagine your co-worker emails you on Saturday, visualize processing your reaction and creating a plan of action. Will you reply right away? Will you respond Monday morning, apologize and say you were with your family? This way, when a moment like this comes up, "you won't be hijacked by your emotions. You'll be able to handle it much more rationally" and refer to the protocol you already have in place.</p> <p>Additional Resources Other resources on drawing boundaries between your personal and professional life and navigating relationships at work:</p> <ul style="list-style-type: none"> ▪ <i>The Power of Full Engagement</i> by Jim Loehr and Tony Schwartz ▪ <i>Getting Things Done</i> by David Allen ▪ <i>Failure to Communicate</i> by Holly Weeks 	
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7. Winning The Battle of "Doing it All" (Complete at least one)

Action	Mark completed items
<p>ASK FOR HELP Even in today's world, it takes a village to raise a child. Asking for help requires humility, but seeking support can be one of the biggest keys to success. This is especially true for single parents. Successful parents don't necessarily depend on others, but are often willing to trade favors. For example, they may ask for help driving the kids to soccer practice in exchange for taking over weekend carpool duties for other busy families. When parents arrange for assistance that ensures their kids are being cared for, they're able to be more productive at work. At the same time, many professionals believe that asking for help at work is a sign of weakness or inability to effectively time manage. Yet, many caregiver lawyers fail to see the ultimate downside to not asking for help: incomplete or poorly completed projects, burn out, isolation, and anxiety/depression. Winning the battle of doing it all requires support systems in place both professionally and personally to provide help if and when it is needed.</p> <p>Discuss with the Mentee the support systems available to the Mentee to seek help when necessary. If no support system is in place, work with the Mentee to vision and create support systems in their personal and professional worlds. If support systems are in place, discuss with the Mentee how and when those systems will be activated.</p>	

<p>EQUITABLE IS NOT EQUAL</p> <p>Achieving a balance between career and caregiving doesn't necessarily mean the time is split evenly. Successful caregivers understand that there will be times when their family will need more attention and times when a career will demand more energy. They don't try to divide the time equally and fairly. Instead, they remain flexible. They evaluate their progress and determine where they need to devote their attention on a regular basis. When their work-life balance seems off-kilter, they readjust to meet the demand.</p> <p>Discuss with the Mentee how they evaluate their effectiveness at balancing of professional and personal demands. Include in your discussion how the Mentee can overcome the natural impulse to devote equal amounts of time to each endeavor and how to readjust their priorities when the balance of pursuits becomes untenable.</p>	
<p>DON'T NEGLECT YOURSELF</p> <p>There's a reason why airlines say that in the event of an emergency you should put your oxygen mask on first, before assisting anyone else. If you don't take care of yourself first, you won't have anything left to give. When you're feeling overtired and stretched too thin, it may seem incomprehensible to squeeze in a little "me time." But, the fact is, those times when you feel like you can't possibly spare a minute for yourself, are likely the times when you need "me time" the most. Successful caregivers know that taking care of themselves helps their efficiency and productivity over the long-term.</p> <p>Discuss with the Mentee their plans for taking care of themselves and prioritizing activities that include getting enough sleep, eating healthy foods, and daily physical activity. Include in your discussion a self-analysis of the ways in which the Mentee can notice when they need to put on their own oxygen mask and their plan for seeking support in doing so.</p>	
<p>NO AWARD FOR GUILT</p> <p>Most caregivers would probably rather not work full-time, but for many families it just isn't an option for one person to stay home. At the same time however, many caregiver-professionals deeply want to give their work full-time attention. Lawyers who successfully balance their work and home life, don't waste time and energy on guilt over the fact that they're working or not working. Instead, they either work on a plan to solve the problem – like work flexible hours – or they accept that they'll need to maintain a full-time job while caring for or raising a family.</p> <p>Lawyers who successfully balance caregiving and work understand that making their family a priority sometimes means working hard to meet their families' needs. Similarly, they understand that being a caregiving professional means not dedicating every minute of the day to professional pursuits. It is possible for successful professionals to still be quality parents, spouses, and caretakers. Successful caregivers focus their spare time and energy on caring for their family – not wishing they didn't have to work.</p> <p>There is no award for feeling the most guilt about your obligation to work or to your family. Discuss with the Mentee the role guilt plays in forming the narrative about whether they are effective as a caretaker and as a professional. Include in your discussion and analysis how guilt impacts the Mentee's mental health, what purpose guilt serves for the Mentee, and strategies for the Mentee to engage to limit the amount of guilt felt when working and not working.</p>	

8. Public Service & Work/Life Integration (Complete at least one)

Action	Mark completed items
Get acquainted with legal aid programs, local pro bono programs, and other opportunities for engaging in pro bono activities and civic and charitable work. Discuss the reasons for making time to engage in volunteer legal service to the public and any impediments to undertaking such work.	
Mentee attends a civic club of which the mentor is a member or some other community service activity in which the mentor participates. Discuss the reasons for making time to engage in volunteer legal service to the public.	
The pair participates in a bar-sponsored or other volunteer program aimed at delivering legal services to the public. Discuss the reasons for making time to engage in volunteer legal service to the public.	