

COLORADO PSC PROFESSIONAL TEAM MEMBER MENTORING TRAINING PLAN

INSTRUCTIONS: FOR EACH TRAINING COMPONENT BELOW, PLEASE SELECT ONE OF THE AVAILABLE ACTIVITIES OR CREATE AN APPROPRIATE ACTIVITY THAT REFLECTS THE INTENT OF THAT SECTION TO SUBMIT AS PART OF THE MENTORING AGREEMENT.

I. INITIAL PLANNING MEETING, PERSONAL, AND PROFESSIONAL DEVELOPMENT (complete all)

Action	Date Completed
Meet at the mentor’s office (or via another practicable method) to prepare the customized mentoring plan based on the Mentee’s needs and interests. Discuss best communication methods for each professional, 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 other problem-solving court members in the profession (if not already done).	
Include in the meeting a day-in-the-life discussion, including discussion about work-life balance, substance use and co-occurring disorders, and secondary trauma issues facing professionals in this role while also describing some of the services available to the profession regarding managing self-care.	
Other:	
Other:	

II. THE COLORADO BAR, LEGAL COMMUNITY, AND PROBLEM-SOLVING COURTS (complete at least one)

Action	Date Completed
Attend a meeting of a professional association (such as an organized bar association or other relevant networking event), if possible, together. Introduce the Mentee to other professionals in attendance. Discuss the advantages of professional association involvement and discuss the many local, state, and national associations available, including any in the Mentees specific practice area.	
Meet at the local courthouse(s), particularly the one in which the Mentee may be appearing, and make introductions to members of the judiciary, court	

personnel, and clerks of court. Discuss customary rules of civility or etiquette in court and among lawyers, judges, and professionals in the community.	
Attend a professional gathering of criminal justice members in the community (such as a Term Day (or similar activity)) that involves a gathering of judges, attorneys, and other professionals in the problem-solving court or recovery support related field.	
Other:	
Other:	

III. HISTORY AND IMPORTANCE OF THE PROFESSION & PROBLEM-SOLVING COURTS

Action	Date Completed
Required (to be completed with the activity elected from list below)	
Review history surrounding the creation of problem-solving courts and explore locally or interview other team members about how the participants' program began.	
Complete at least one of the following:	
Discuss how current topics for the profession fit within the problem-solving court movement and its continued growth as part of the criminal justice system.	
Complete a training or discussion regarding the history of the profession and the agency the profession is located within.	
Arrange a meeting with a senior professional in the field to share some of their experiences their career and observations regarding where the profession may be trending.	
Plan a project to recognize or document the history of a component of the problem-solving court or aspect of the profession that highlights its value to the criminal justice community.	
Attend an event in another jurisdiction highlighting the anniversary of a problem-solving court or one commemorating a significant milestone relative to the profession.	
Other:	

Other:	

IV. COLORADO RULES OF PROFESSIONAL CONDUCT, PROFESSIONALISM, CIVILITY, AND PROBLEM-SOLVING COURT BEST PRACTICES & STANDARDS

Action	Date Completed
Required (to be completed with the activity elected from the list below)	
The pair should discuss the distinction between the professional rules or guidelines for the Mentor/Mentee’s Role, (e.g. the Colorado Attorney Rules of Professional Conduct) and professionalism; the profession’s obligations to the court, the client, and other parties (such as opposing counsel); common ethical issues and resources for how to resolve difficult ethical questions; common grievance and malpractice “traps” and how to avoid them; the nature of professional liability (such as the benefits of carrying malpractice insurance and the ramifications for failing to do so); ethical considerations that may arise by dual membership of a profession and also the problem-solving court team.	
Review the Colorado Best Practice Manual OR Colorado Standards Document for the court(s) the mentee is assigned to.	
Complete at least one of the following:	
Discuss how to screen for, recognize, and avoid conflicts of interest.	
Discuss the responsibilities of the client and the multidisciplinary team (including other lawyers/counsel) in decision-making, the best ways to involve a client/participant in their case. Discuss client communications generally, e.g., how to say no to a client, billing issues, etc.	
Discuss preparation and proper behavior during discovery.	
Discuss how to prepare for negotiation of a legal matter, when and how negotiation is initiated, how to involve the client, ethical and professionalism obligations of negotiators, skills needed to be an effective client advocate and how to acquire them.	
Discuss appropriate ways to handle situations where a professional believes another professional 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 or unprofessional.	

Discuss the profession's grievance process and duty to cooperate with a disciplinary investigation.	
Discuss client/participant management and the recovery process, appropriate procedures and ethical implications.	
Discuss the role of the multidisciplinary team, effective communication, and confidentiality (e.g. HIPPA or 42 CFR part II).	
Review and discuss the National Association of Drug Court Professionals Best Practice Standards Volumes I and II (or watch Dr. Marlowe's presentations/webinars).	
Other:	
Other:	

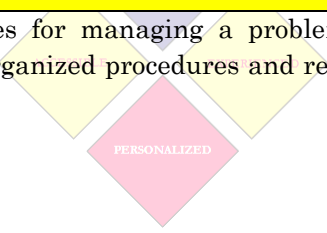
V. PRACTITIONER EXPERIENCES IN A PROBLEM-SOLVING COURT (complete at least two)

Action	Date Completed
Discuss types of alternative criminal justice processes such as problem-solving courts, diversion, restorative justice (or something of a similar nature).	
Mentee attends one of the alternative justice proceedings (non-problem solving courts) listed above. The pair discusses and evaluates what was observed.	
Mentee attends or participates in a restorative justice practice. The pair discusses and evaluates what was observed.	
Mentee attends or participates in part or all of a criminal trial, whether, bench or jury, state or federal. The pair discusses and evaluates what was observed.	
Mentee attends or participates in an appellate oral argument before the Colorado Supreme Court, Colorado Court of Appeals, or the Tenth Circuit Court of Appeals. The pair discusses and evaluates what was observed.	
Mentee attends or participates in an open session (such as A.A.) conducted by a treatment provider that targets individuals who are in recovery. The pair discusses and evaluates what was observed.	
Mentee observes a probation or treatment provider assessment or evaluation. The pair discusses and evaluates what was observed.	

Mentee attends meeting to execute problem-solving court agreement documents. The pair discusses and evaluates what was observed.	
Mentee attends or participates in a planning/strategy advisory or planning committee meeting regarding a best business practice or program planning. The pair discusses and evaluates what was observed.	
Mentee attends or participates in meeting, hearing, or other proceeding specific to his or her or the mentor's professional practice area. The pair discusses and evaluates what was observed.	
Other:	
Other:	

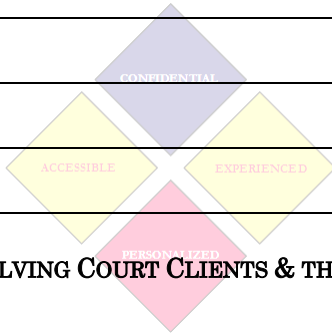
VI. MANAGING THE PROFESSIONAL DUTIES AND PRACTICES

Action	Date Completed
Required (to be completed with the activity elected from list below)	
Discuss best professional practices for managing a problem-solving court caseload and the importance of organized procedures and records regarding the following topics, if applicable:	



<ul style="list-style-type: none"> • Time records • Records of client-related expenses • Filing system and procedures • Document retention plan • Calendar reminder systems • Information technology systems • Client/participant case management systems • Library and research systems • Other resources (publications, seminars, equipment) • Billing/resource systems (if applicable) • Client retainer and/or payment schedules, types of fee agreements (if applicable) • Escrow and trust account, establishing an COLTAF, accounting, auditing, use of interest proceeds, proper procedures for handling client funds and other property (if applicable). • Exit Interviews & Alumni Groups • Participant Handbooks & Contracts • Practitioner Confidentiality Forms & Waivers 	<ul style="list-style-type: none"> • Steering Committees • MOUs/Team Member Roles • Mission Statements • Goals and Objectives • Eligibility Criteria/Disqualification Criteria • Entry Process Charts • Entry, Referral, Case Processing, and Legal Screening Protocols • Clinical Screening and Assessment Protocols • Court Phases, Graduation and Termination Criteria • Incentives and Sanctions • Courtroom Protocols • Treatment Protocols/Treatment Phases • Case Management, Supervision, Drug Testing Protocols • Program Fees • Data Collection Tools and Evaluation Designs • Ethics and Confidentiality Statements 	
Complete at least one of the following:		
Discuss role and responsibilities of paralegals, secretaries and other office personnel, and how to establish good working relationships with others in the same office who are support staff, colleagues or senior management (such as Chief Probation Officers, Elected District Attorneys, etc.) Discuss the “care and feeding” of support staff.		
Discuss practices to maintain client confidentiality.		

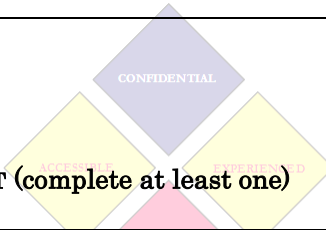
Discuss good time management skills and techniques.	
Discuss how to screen for, recognize, and avoid conflicts.	
Discuss how to prevent issues of unauthorized practice of law with staff and other professionals.	
Discuss office dynamics, including appropriate networking, socializing, and personal behaviors.	
Discuss the importance of planning ahead for handling the professional practice in the event of retirement, disability, or death.	
Discuss the issues surrounding leaving a profession, such as how to protect oneself, advising clients/participants, and withdrawing from cases. Included within this discussion should also be steps towards proactively addressing change via succession planning for the individual as well as the PSC.	
Discuss evaluation and compensation procedures and professional advancement within an organization.	
Other:	
Other:	



**VII. WORKING WITH PROBLEM-SOLVING COURT CLIENTS & THE MULTI-DISCIPLINARY TEAM
(complete at least one)**

Action	Date Completed
Discuss importance of client communication, how to maintain appropriate ongoing communication (returning telephone calls, email) to keep clients informed, including use of participant agreements, timeliness, written communication, etc. Discuss how to deal with a “difficult” client. Discuss dealing with clients with respect to the professional or business aspects of the relationship, including billing (if applicable) and other business/practice procedures.	
Discuss proper professional counseling, including the duties and responsibilities of advising clients and the respective responsibilities of the client and the profession in decision-making. Discuss how to deal with a “difficult” client.	

Discuss the initial meeting and interaction with a potential client/participant, tips for gathering information about a legal matter, appraising the credibility and trust of the potential client, evaluating whether to accept the representation, how to decline representation. Discuss making and accepting referrals and working within the multidisciplinary team.	
Discuss the termination of the professional-client relationship, issues with terminating mid-representation, necessary steps, and documentation.	
Discuss the nuances of collaborating working with a variety of professionals in the case management process.	
Discuss how the recovery process effects traditional client or case management in the context of a multidisciplinary team.	
Other:	
Other:	



VIII. PROFESSIONAL DEVELOPMENT (complete at least one)

Action	Date Completed
Required (to be completed with the activity elected from list below)	
Complete a reengagement activity at about 180 days (or 6 mos.) such as viewing or attending a recorded webinar together, an in-person meeting or phone call with the program coordinator, or view a live webinar and discuss about how to take home and implement new materials or practices (if relevant or relevant components) within the local program.	
Complete at least one of the following:	
Attend a conference or training for the mentee (other than Colorado Collaborative Justice Conference (CCJC)) that is specific to the mentee's profession (if funding available) such as the National Association of Drug Court Professional's annual conference and training.	
Participate in an activity sponsored by a local, statewide, or national professional association that aligns with a professional development goal.	

Review and discuss a professional development book, webinar series, or another appropriate learning modality that is geared towards a mentee-identified goal.	
Visit and observe two or more different problem-solving courts in neighboring or nearby jurisdictions in Colorado.	
Other:	
Other:	

IX. PUBLIC SERVICE & COMMUNITY ENGAGEMENT (complete at least one)

Action	Date Completed
Acquaint the Mentee with legal aid programs, local pro bono programs, and other opportunities for engaging in pro bono activities and civic and charitable work with a specific focus on the recovery support field. Discuss the reasons for making time to engage in volunteer legal or professional 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 profession-sponsored or other volunteer program aimed at delivering legal or other support services to the public as applicable for the profession. Discuss the reasons for making time to engage in volunteer legal or other support services to the public/participants.	
Create and implement an opportunity to raise awareness in the community regarding the local problem-solving court program that may contribute to team development or provide a service opportunity for volunteers to help tackle a needed program activity.	
Other:	
Other:	

X. ELEVATING THE PROFESSION (complete at least one)

Action	Date Completed

Present about the problem-solving court program or problem-solving courts generally to a local public audience, a professional conference, or conduct/create an orientation to PSCs for the mentee's office/agency.	
Join a subcommittee of the Colorado Problem-Solving Court Advisory Committee.	
Create or get involved with a local 501(c)(3) that supports the recovery process.	
Implement or improve a process locally that enhances the ability of agencies to collaborate to better serve problem-solving court clients effectively.	
Other:	
Other:	

