



Mentoring Plan For Lawyers New to Colorado

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 at together in person (where practical) to prepare the customized mentoring plan based on the Mentee’s needs and interests. Utilize the CAMP Initial Goal Plan & Meeting Guide to assist your mentoring pair in developing goals for the mentoring relationship.	
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.	
Include in the meeting a day-in-the-life discussion, including discussion about work-life balance, mental health and substance abuse issues facing lawyers, and the services available to attorneys regarding these health issues.	

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

Action	Mark completed items
Mentor and mentee attend a meeting of their local bar association. Introduce the Mentee to other attorneys in attendance.	
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 and judges in the community.	
Attend a Term Day (or similar activity) which involves a gathering of judges and attorneys of the local bar.	
Meet together to discuss how to define “Small Town” practice in today’s global society	
Discuss specifically the notion of “Wall Street” vs. “Main Street” to develop the mentee’s preferences and ideals concerning the type of law practice they want to create. What are the pros and cons of practicing outside of Denver?	

3. Developing Professional Identity & Lawyer Well-Being (complete at least two)

Action	Mark completed items
<p>It is envisioned that this component of the Mentoring Plan should be creatively tailored for the individual mentee’s needs. The discussion should focus on understanding “why” the mentee chose the profession of law and what the mentee seeks to accomplish in their professional role.</p> <ul style="list-style-type: none"> • How does the mentee define “professional success” and whose input/feedback did they utilize in developing this definition? • What characteristics, skills, and attributes does the mentee have that will allow them to find professional success? • Who are the people in the mentee’s personal and professional community who will support them in finding professional success? <p>Assist the mentee in articulating their “Professional Identity” as a lawyer. Utilize John Bliss, The Professional Identity Formation of Lawyers, The Practice (March/April 2016). https://thepractice.law.harvard.edu/article/the-professional-identity-formation-of-lawyers/ to assist your mentoring pair in facilitating this discussion.</p>	
<p>Engage Mentee in a self-reflective exercise to determine whether Mentee believes they are thriving in all dimensions of “well-being” including:</p> <p>Emotional: Recognizing the importance of emotions. Developing the ability to identify and manage our own emotions to support mental health, achieve goals, and inform decision-making. Seeking help for mental health when needed.</p> <p>Occupational: Cultivating personal satisfaction, growth, and enrichment in work; financial stability.</p> <p>Intellectual: Engaging in continuous learning and the pursuit of creative or intellectually challenging activities that foster ongoing development, monitoring cognitive wellness.</p> <p>Spiritual: Developing a sense of meaningfulness and purpose in all aspects of life.</p> <p>Social: Developing a sense of connection, belonging, and a well-developed support network while also contributing to our groups and communities.</p> <p>Physical: Striving for regular physical activity, proper diet and nutrition, sufficient sleep, and recovery; minimizing the use of addictive substances; seeking help for physical health when needed.</p> <p>Assist Mentee in developing well-being objectives and a plan to address Mentee’s self-identified deficiencies in these dimensions of well-being. Consider the ABA Well-Being Toolkit for Lawyers and Legal Employers in building a well-being action plan.</p>	
<p>Engage the Mentee in a reflective exercise regarding resilience. How does the Mentee assess their own resiliency? What factors account for the Mentee’s measurement of resilience? Assist Mentee in developing a plan to improve their resiliency. Consider the following resources:</p> <ul style="list-style-type: none"> • Three Ways Lawyers Can Become More Resilient • Survival Skill No. 1 for Lawyers: Emotional Resilience 	

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 the distinction between the Colorado RPC and professionalism; the attorney’s obligations to the court, the client, and 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 benefits of carrying malpractice insurance and the ramifications for failing to do so.	
Engage Mentee in a reflection on “bullying” and “toxicity” in the legal profession. Define what these terms mean to the Mentee and reflect on whether the Mentee has experienced these issues or has contributed to these issues at various points in their legal career. Develop with the Mentee a personal plan for avoiding and responding to bullying or toxic behavior. Consider the following resource: <ul style="list-style-type: none"> • Dealing with Lawyer Bullies 	
Complete at least two of the following:	
Discuss how to screen for, recognize, and avoid conflicts of interest.	
Work with Mentee to develop communication and leadership skills necessary to establish professional working relationships with support staff, associates, and partners. Consider the following resources in your discussion: <ul style="list-style-type: none"> • Fire & Ice: An Associate’s View of Partners • I Don’t Feel Your Pain: A Partner’s View of Associates • Six Ways to Work Successfully With Support Staff 	
Discuss competency and professionalism 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 negotiator and how to acquire them.	
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 or unprofessional.	
Discuss the grievance process and a lawyer’s duty to cooperate with a disciplinary investigation.	
Discuss client development and marketing, appropriate procedures and ethical implications.	

5. Leveraging Colorado’s Unique Qualities to Find Success in Practice (complete at least two)

Action	Mark completed items
<p>TRANSPLANT STATE: The allure of the Rocky Mountains brings people to Colorado from all across the United States. As a result, there is likely at least a handful of alumni from your law school living in Colorado. Focus on maximizing relationships with other Colorado transplants with the goal of helping each other to navigate an unfamiliar legal community. Locate and connect with law school alumni groups or individuals in your community.</p>	
<p>UNIQUE PRACTICE AREAS: Colorado’s vast outdoors provides ample opportunity for practicing law in areas unique to this part of the country. Ski/snowboard law, rafting law, natural resources law, mining law, and Native American law represent practice areas unique to Colorado. In addition, Colorado’s budding recreational marijuana industry has created abundant legal work in this field. Consider whether your expertise can be leveraged in any of these unique practice areas.</p>	
<p>WELLNESS: Coloradoans take their “play” time very seriously. Most people in Colorado value physical fitness, outdoor activities, and leisure time with friends and family. As a result, it is unheard of to actually take a vacation, operate on a flexible work schedule, or work remotely. Consider ways in which you can capitalize on Colorado’s more flexible work environment to ensure work/life integration in your practice.</p>	
<p>VOLUNTARY BAR: Unlike many states, Colorado’s bar associations are entirely voluntary. As a result, those attorneys who become members and engage with their bar associations truly have an interest in contributing to and improving the legal profession in Colorado. Consider the benefits and advantages of bar association involvement and discuss the many local, state, and national associations available to Colorado Attorneys.</p>	
<p>MOUNTAIN/RURAL LAW PRACTICE: Colorado may not be the largest state in the nation, but there are plenty of beautiful and more remote places to practice law. In addition, for those who want the best of both worlds, there is plenty of opportunity for those taking advantage of life and practice in mountain and rural communities to access Denver’s legal resources and community. If you are considering a practice in a mountain or rural community, connect with small-town practitioners to learn more about what practice is like outside of the Denver metro and envision your professional identity as a mountain or rural lawyer.</p>	

6. Mountain & Rural Law Practice (Discuss If Applicable)

Action Required (to be completed with the activity elected from list below)	Mark completed items
<p>Discuss mountain and rural law practice and the relevance of the following issues when starting a small town law practice:</p> <ul style="list-style-type: none"> • ENGAGE WITH THE COURT CLERKS AND OTHER COURTHOUSE PERSONNEL <p>Court clerks know a lot about the on-the-ground aspects of practicing law and navigating the differing personalities and tendencies of judges. Friendly court clerks can help you get pleadings filed to the liking of their judge and assist in avoiding unintentionally irritating the court. Be friendly to everyone — you might be surprised when you need that janitor to open the door to the courthouse after hours.</p> <ul style="list-style-type: none"> • ALWAYS BE ON TIME AND PREPARED <p>Being early for all court appearances may seem like a “no brainer,” but a large number of attorneys do not appear on time. They will double-book themselves or just show up late. Many</p>	

<p>attorneys show up without even looking at the materials for the hearing. You can “fake it” on occasion, but lack of preparation is usually readily apparent. Your reputation means everything in a small town. You only get one chance to make a first impression on a judge that may decide every case of your career.</p> <ul style="list-style-type: none"> • BE AVAILABLE <p>In order to be successful in a small-town practice, you must be available. You have to keep regular office hours. You have to be willing to talk to people at the grocery store, the dry cleaners and everywhere else for that matter. You must be visible in the community.</p> <ul style="list-style-type: none"> • BILLING IS IMPORTANT <p>You are in business to help people, and you can’t do that if you don’t bill properly. We all know attorneys who work all the time; they have hundreds of clients, and they are always at wit’s end because they are so busy. However, they don’t make nearly as much money as other attorneys in town. The business part of the practice is easy to ignore. You are spinning your wheels if you don’t stop yourself and make sure you are billing and collecting.</p> <ul style="list-style-type: none"> • MAKE FRIENDS WITH LOCAL ATTORNEYS AND JUDGES <p>The collegiality of other local attorneys is the most important thing you can have in your professional life. If other attorneys like and respect you, the benefits abound. You always have a friend to call with questions. Even if they are adverse to you in a case, they can help if you make a mistake. Don’t be afraid to have friends who are judges. The ethical rules have some constraints on relationships you can have with judges, but there is no reason why judges shouldn’t be great friends. You are not befriending them to inappropriately sway their decision. We work with these people daily, and being friends with them should be a natural outcropping of your proper conduct around them.</p> <ul style="list-style-type: none"> • DON’T TAKE CASES YOU DON’T KNOW ANYTHING ABOUT <p>Small towns present a wide variety of legal work. There is a tendency to take matters you know nothing about. If you must take on a matter in an area of law in which you are not familiar, get involved with another attorney the first time or two until you know exactly what needs to be done. If you do not believe you are competent to take on a matter, refer the case to someone who really knows that area.</p>	
Complete at least one of the following as it pertains to small town law practice:	
Discuss role and responsibilities of paralegals, secretaries and other office personnel, and how to establish good working relationships with support staff or colleagues	
Discuss practices to maintain client confidentiality.	
Discuss office politics, including appropriate networking, socializing, and personal behaviors.	
Succession Planning: Discuss the importance of planning ahead for handling the practice in the event of retirement, disability, or death.	
Discuss the benefits/issues with a collaborative law practice and co-working space.	

7. Denver & Metro Area Law Practice (Discuss if Applicable)

Action	Mark completed items
Discuss the importance of developing a professional identity which allows you to distinguish yourself from amongst the homogenous slate of attorneys	
Being a Denver attorney doesn’t mean you can’t focus your practice on one of the smaller communities surrounding the city. The Denver metro area is comprised of several smaller jurisdictions. Discuss the pros and cons of focusing your practice on a local jurisdiction, while still appealing to Denver clients.	

Discuss the types of leadership opportunities available in the Denver legal community to help the mentee develop name recognition and reputation. Focus on committees, commissions, and boards.	
Examine the Denver legal market. What are the trends in hiring, firm growth, and client needs. Assist the mentee in understanding all of the components impacting the success of law practice in Denver, especially those not usually discussed: <ul style="list-style-type: none"> • Greater price competition • Practice efficiency • Commoditization of legal work • Competition from non-traditional service providers • Non-hourly billing/demand for alternative fee arrangements 	

8. Professionalism in Working With Clients (Complete at least three)

Action	Mark completed items
Review the Colorado Principles of Professionalism https://www.cobar.org/For-Members/Committees/Professionalism-Coordinating-Council/Principles-of-Professionalism as a pair and select at least three principles for further discussion as to their application to the mentee’s practice of law.	
Discuss the initial meeting and interaction with a potential client, 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.	
Discuss importance of client communication and strategies to maintain appropriate ongoing communication (returning telephone calls, email, etc.) to keep clients informed, including use of fee agreements, timeliness, written communication, etc. Evaluate any policies adopted by Mentee’s organization or discuss the benefits of adopting a formal communication policy.	
Discuss proper legal counseling, including the duties and responsibilities of advising clients and the respective responsibilities of the client and the lawyer in decision-making.	
Assess best practices for communicating with clients regarding the business aspects of the relationship, including billing and other business procedures. Evaluate Mentee’s collections policies and communication mechanisms related to those policies.	
Discuss proper legal counseling, including the duties and responsibilities of advising clients and the respective responsibilities of the client and the lawyer in decision-making. <ul style="list-style-type: none"> • Consider the following resources in your discussion: <ul style="list-style-type: none"> ○ Do You Have a Client Centered Law Practice?, Sullivan, 2016 ○ The Lawyer As the Counselor, Burtch, 2010 ○ Who is My Client? Client Centered Lawyering With Multiple Clients, Lawton, 2015 	
Discuss how to deal with a “difficult” client. Include in this discussion tools for evaluating when it is time to withdraw from representation, avoid ethical pitfalls, and professionally and responsibly terminate a client relationship. <ul style="list-style-type: none"> • Taming the Beast, How to Manage Difficult Clients, Lowentheil, 2017 	
Discuss the termination of the attorney-client relationship, issues with terminating mid-representation, necessary steps and documentation.	

9. Public Service (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.	
Discuss opportunities to engage modest means clients in an effort to advance access to justice in Colorado.	