



Mentoring Plan For Lawyers New to Practice

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 professional and 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 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 one)

Action	Mark completed items
Attend a meeting of an organized bar association or other attorney networking event together. Introduce the Mentee to other attorneys in attendance. Discuss the advantages of bar 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 and judges in the community.	
Attend a Term Day (or similar activity) which involves a gathering of judges and attorneys of the local bar.	

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. Litigation and Transaction Experiences (complete at least two)

Action	Mark completed items
Discuss types of alternative dispute resolution (ADR) such as mediation, arbitration, early neutral evaluation, summary jury trials, collaborative law practice.	
Mentee attends one of the ADR proceedings listed above. The pair discusses and evaluates what was observed.	
Mentee attends or participates in a deposition. The pair discusses and evaluates what was observed.	

Mentee attends or participates in part or all of a trial, whether, civil or criminal, 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 a hearing conducted by a state or local administrative body (e.g. local zoning board, tax equalization board hearing; state licensing or regulatory body). The pair discusses and evaluates what was observed.	
Mentee observes a real estate closing or other business transaction or financial closing. The pair discusses and evaluates what was observed.	
Mentee attends meeting to execute estate planning documents. The pair discusses and evaluates what was observed.	
Mentee attends or participates in a planning/strategy meeting regarding a business transaction or estate 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 practice area. The pair discusses and evaluates what was observed.	

6. Law Office Management and In-Office Procedures

Action	Mark completed items
Required (to be completed with the activity elected from list below)	
Discuss law office management best practices (preferably including a tour of the mentor's office), and the importance of maintaining organized procedures: <ul style="list-style-type: none"> • Time records. • Records of client-related expenses. • Billing system. • Client retainer and/or payment schedules, types of fee agreements. • Escrow and trust account, establishing an COLTAF, accounting, auditing, use of interest proceeds, proper procedures for handling client funds and other property. • Filing system and procedures. • Document retention plan. • Calendar reminder systems. • Information technology systems. • Library and research systems. • Other resources (publications, seminars, equipment). 	
Complete at least two 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 partners. 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.	
Discuss office politics, including appropriate networking, socializing, and personal behaviors.	

Discuss the importance of planning ahead for handling the practice in the event of retirement, disability, or death.	
Discuss the issues surrounding leaving a firm, such as how to protect oneself, advising clients, and withdrawing from cases.	
Discuss evaluation and compensation procedures, and professional advancement within a firm.	

7. 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, Lowenthal, 2017 	
Discuss the termination of the attorney-client relationship, issues with terminating mid-representation, necessary steps and documentation.	

8. Public Service (Complete at least one)

Action	Mark completed items
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. 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.	