**Modern Law Practice Mentoring Plan**

1. **Initial Planning Meeting, Personal and Professional Development**

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| Action | Mark completed items |
| Meet in person (where practical) or virtually to prepare the customized mentoring plan based on Mentee’s needs and interests. Utilize the CAMP [Initial Goal Plan & Meeting Guide](http://coloradomentoring.org/wp-content/uploads/2018/06/Initial-Meeting-Guide-Goal-Plan-June-2018.pdf) to assist your mentoring pair in developing goals for the mentoring relationship. Discuss best communication methods for each lawyer and consider scheduling all remaining meetings/activities for the mentoring term. |  |
| In tailoring the mentoring plan to Mentee’s interests, discuss long-term career goals and professional identity and consider ways to achieve them. |  |
| Mentor should introduce Mentee to the firm’s attorneys and staff (if applicable). |  |
| If mentee has already started a modern law practice, encourage Mentee to complete the [Colorado Lawyer Self-Assessment](http://www.coloradosupremecourt.com/AboutUs/LawyerSelfAssessmentProgram.asp). Specifically focus on Section 9 which references Access to Justice. Review Mentee’s responses to the Self-Assessment questions, and incorporate areas of improvement into this mentoring plan. |  |
| Include in the meeting a day-in-the-life discussion, including discussion about work-life integration, mental health and substance abuse issues facing lawyers, and the services available to attorneys regarding these health issues. |  |
| Focus on building rapport with your mentoring partner through the following steps:   1. Shift Your Mindset to “I Am Worthy of Mentoring” 2. Look for Indicators of Shared Humanity With Your Mentoring Partner 3. Identify One Thing You Can Appreciate About Your Mentoring Partner 4. Listen to Understand 5. Be Open…Not Transactional |  |

1. **Professional Identity in Modern Representation and Legal Entrepreneurship**

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| Action | Mark completed items |
| Meet to discuss the rise of modern representation and legal entrepreneurship in the last decade. |  |
| Discuss specifically how modern representation fits in to the overall legal profession and the importance of said field. |  |
| Consider the need for modern law practitioners in rural communities throughout Colorado. How can modern law practice positively impact these communities? |  |
| Discuss the “target market” for modern law practitioners. Include in your discussion the financial characteristics of these clients, the matters in which they are involved, and the values/beliefs they employ when seeking legal assistance. |  |

1. **The Colorado Bar and Legal Community**

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| Action | Mark completed items |
| **Complete at least one of the following:** |  |
| Mentor and Mentee attend a Modern Law Practice Initiative bar association meeting or other attorney networking event focusing on modern lawyer interests. Introduce Mentee to other lawyers in attendance. Discuss the advantages of bar association involvement and discuss the many local, state, and national associations available to lawyers and legal entrepreneurs. |  |
| Attend [Trust Account School](https://coloradosupremecourt.com/Complaints/TrustEthicsPractice.asp) offered by the Office of Attorney Regulation Counsel. |  |
| Meet at the local courthouse(s), particularly the one in which 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 Modern Representation 101 or other courses focusing on modern representation offered by CBA/CLE](https://cle.cobar.org/Practice-Area/Modern-Law-Practice). |  |
| Discuss the benefits of the [Colorado Lawyer Assistance Program (COLAP)](http://coloradolap.org/) and how it can be a resource to any lawyer needing 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. |  |

1. **Colorado Rules of Professional Conduct, Professionalism, and Civility**

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| 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. |  |
| **Complete at least two of the following:** |  |
| Discuss how to screen for, recognize, and avoid conflicts of interest. |  |
| Discuss the responsibilities of the client and the lawyer in decision-making, the best ways to involve a client in their case. Discuss client communications generally, e.g., how to say no to a client, billing issues, etc. |  |
| Discussing creating and managing positive and productive relationships with opposing counsel. |  |
| 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 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. |  |
| Discuss the Colorado Rules of Professional Conduct which particularly obtain to providing unbundled and limited scope services. Use the following resources in your work together:   * [Colorado Formal Ethics Opinion 101](http://www.cobar.org/Portals/COBAR/repository/ethicsOpinions/FormalEthicsOpinion_101.pdf) * [ABA Unbundling Resource Center](https://www.americanbar.org/groups/delivery_legal_services/resources/) * [DU Unbundling Best Practices](https://iaals.du.edu/sites/default/files/documents/publications/judgetaubman.co_roadshow.pptx) |  |
| Discuss how the Colorado RPC and professionalism can present unique issues to female attorneys. Discuss ways to avoid common pitfalls and unprofessional acts by other members of the legal profession. |  |

1. **Law Practice Start-Up**

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| Action | Mark completed items |
| **Required** |  |
| Read the CBA’s [*Successful Business Planning for the Modern Law Practice*](https://www.cobar.org/For-Members/Modern-Law-Practice-Initiative/Successful-Business-Planning-for-the-Modern-Law-Practice-Chapter-Download)(Toolkit)*.* Discuss the topics raised in each chapter as a roadmap to creating/transitioning to a modern law practice. |  |
| **Complete at least two of the following:** |  |
| **FINANCE:** As with any business, there is an initial cost to starting up your practice. Many practices start off on a shoestring budget and make more substantive investments once the cash begins to flow in. But you will need some cash or credit initially for the essentials, like malpractice insurance. Make a list of the essentials versus non-essentials and the costs associated. Use that information to construct a budget – include initial and monthly costs through your first year. Thus, you’ll know what funds you need upfront and how much you need to make over the course of the year to cover expenses (and profit). Accompanying your budget should be revenue projections for the year. This may seem difficult upfront, but necessary to set goals for your practice and be realistic about expectations. *See Toolkit: Chapter One – Prepare a Budget (section)* |  |
| **MARKETING:** You can no longer merely “hang a shingle” and expect clients to walk through your door. As competition increases and more and more prospective clients look to the internet for answers to their legal problems, you need to have your pulse on new marketing strategies. Especially when starting out, you should have a marketing plan or platform to inform where and how you will market to prospective clients and referral sources. At the outset, focus on what you know and what you’re good at, but make sure to include some variety and continue to redefine your plan based on legal trends and analytics (what’s working, what’s not). *See Toolkit: Chapter Six* |  |
| **OPERATIONS:** When opening your own practice, you should understand that to run a  profitable and sustainable practice, you must run it like a business. As such, you’ll need  to establish operational procedures and pay attention to administration in order to ensure  a smooth ride. Operations include maintenance of your office space (whether home,  virtual, or office), organization of your file system, opening new matters, communicating with clients, whether you will contract office support, and setting policies for streamlined administration. *See Toolkit: Chapter One – Basic Law Practice Checklist (section)* |  |
| **RISK MANAGEMENT:** No law firm or attorney is immune to suit for malpractice or complaint, the loss of data, or an unexpected emergency. By building risk management  strategies into your new business, you can drastically minimize the impact of any of  these unfortunate situations. *See Toolkit: Chapter Ten – Legal Malpractice Insurance* |  |
| **TECHNOLOGY:** Technology is no longer the “future” of law practice, it is the  present. Leveraging technology in modern representation is essential, providing huge benefits such as increasing productivity, efficiency, and minimizing malpractice risk. While there is no right answer as to the specific technology you should purchase, consider the basic technology that you need in a modern law office and best practices to ensure that you protect yourself and your clients. Additionally, consider the use of technology in effectively practicing modern law in rural communities. *See Toolkit: Chapter Eight* |  |

1. **Law Office Management and In-Office Procedures**

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| Action | Mark completed items |
| **Required**  **(to be completed with the activity elected from list below)** |  |
| Discuss law office management best practices (including a tour of Mentor’s office, if applicable) and the importance of maintaining organized procedures including:   * Time records; * Filing system and procedures; * Document retention plan; * Calendar reminder systems; * Library and research systems; * Document sharing and e-signatures if working remotely; * Access to online billing & invoices; and * Other resources (MLPI, publications, seminars, equipment, CLEs) |  |
| Discuss law office financial best practices including:   * Start-up costs * Budget & financial planning for the first year * Projecting revenue for law firms * Law firm profitability * Alternative Fee Structures: * Flat Fee * Contingency Fee * Unbundled Services * Subscription billing * Billing & collections procedures * How to take credit card payments * Invoice/bill drafting * Client-related expenses * Collecting unpaid fees * Third party payors * Setting up a trust account * COLTAF Accounting * When to transfer funds from your trust account * Ethical considerations and rules |  |
| Discuss law office marketing best practices including:  • Law firm branding  • Personal branding  • Business card optimization  • Networking 101  • Website building block  • Search engine optimization  • Blogging  • Social Media  • Email Marketing  • Ethical considerations in lawyer advertising  \* Advantages of a modern law practice, such as accessibility, predictable billing, affordability, consistent updates on changes of law, articles, and client check-ins if the matter is still live  \* Accessibility for rural/mountain practitioners to Denver resources |  |
| Discuss law office risk management best practices including:  • Starting a small business  • Developing a business plan  • Entity selection  • Taking on partners  • Tax implications  • Selecting a malpractice insurance provider  • Choosing malpractice coverage options  • Succession planning  • Data security  • Cloud storage  • Physical document retention and storage  • Backup technology systems |  |
| **Complete at least one of the following:** |  |
| Discuss role and responsibilities of paralegals, assistants, and other office personnel, and how to establish good working relationships with others in the same office who are support staff or colleagues (i.e. in an office sharing situation). |  |
| 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 (succession planning). |  |
| Discuss the issues surrounding wrapping up a solo firm, such as how to protect  oneself, advising clients, and withdrawing from cases. |  |
| Discuss the benefits/issues with a collaborative law practice and co-working space. |  |

1. **Professionalism in Working With Clients**

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| Action | Mark completed items |
| **Complete at least three of the following:** |  |
| 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 Mentee’s practice of law. For example: fee agreements, billing structure – flat fee and subscription arrangements; limitations of engagement – unbundling of representation. |  |
| 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.   * Consider the following resources in your discussion:   + [Do You Have a Client Centered Law Practice?, Sullivan, 2016](https://blogs.findlaw.com/strategist/2016/11/do-you-have-a-client-centered-law-practice.html)   + [Who is My Client? Client Centered Lawyering With Multiple Clients, Lawton, 2015](http://www.law.nyu.edu/sites/default/files/upload_documents/Julie%20Lawton%20-%20Client-Centered%20Lawyering%20with%20Multiple%20Clients.pdf) |  |
| 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.   * [Taming the Beast, How to Manage Difficult Clients, Lowentheil, 2017](https://abovethelaw.com/career-files/taming-the-beast-how-to-manage-difficult-clients/) |  |
| Discuss the termination of the attorney-client relationship, issues with terminating mid-representation, necessary steps and documentation. |  |

1. **Litigation and Transaction Experiences**

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| Action | Mark completed items |
| **Complete at least two of the following:** |  |
| Discuss types of alternative dispute resolution (ADR) such as mediation, arbitration, early neutral evaluation, summary jury trials, and 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 their or Mentor’s practice area. The pair discusses and evaluates what was observed. |  |

1. **Work-Life Blend in the Legal Profession**

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| Action | Mark completed items |
| Discuss strategies for integrating a lawyer’s career and personal life, keeping daily stress in perspective, reconciling job expectations with actual experience, and maximizing career satisfaction. Discuss the risk of substance abuse and mental health issues while having this conversation. Discuss what work-life blend means to Mentee, including a self-assessment by Mentee as to whether they are effective blending all aspects of their lives. Discuss specifically how work-life blend fits into the overall health of the legal profession and the importance of promoting it in relationships with other attorneys, including co-workers, co-counsel, or opposing counsel.  Examples for discussion topics in this category: mindfulness; law school debt management; raising a family while lawyering; self-care and stress management; how to identify when one is neglecting self-care; scheduling self-care; emotional intelligence; and the legal profession. |  |
| Participate in a self-care ritual with your mentor. Discuss how Mentor incorporates self-care into their lives and why self-care is important. |  |
| According to clinical psychologist and resilience researcher George Bonanno, a central element of resilience is perception—how you perceive stress, challenge, and adversity directly influences how you will respond to any stress trigger. When lawyers think that they have the resources to deal with a stressor, they are more likely to view stress or adversity as a challenge; conversely, when lawyers perceive their resources to be lacking under stress, they may view stress as a threat. In fact, having a rigid, inflexible response to stress, change, and adversity can lead to the following:   * Increased errors and missing information and deadlines * A “protect my turf” mentality * Diminished collaboration and cooperation * More stress * Poorer work quality * Reduced collegiality and even an increase in incivility * Survival-based emotions and reactions like impatience, defensiveness, and hypercriticality   Discuss with Mentee what resources they have to deal with the stress of transition and how they can engage with these resources during times of professional stress. Include in your discussion ways in which Mentee can assess whether they are effectively utilizing their resources. |  |

1. **Public Service**

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| Action | Mark completed items |
| **Complete at least one of the following:** |  |
| Acquaint 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 benefits in engaging in volunteer legal service to the public, including substantive learning, mentorship, networking, and possible referrals. Discuss how to overcome impediments to undertaking such work, such as time management, training in new practice areas, etc. |  |
| Mentee attends a civic club of which Mentor is a member or some other community service activity in which 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. |  |
| The pair uses the [Succession to Service](https://app.joinpaladin.com/succession-to-service/) platform to find a pro bono opportunity relevant to Mentee’s practice of law. Discuss the reasons for making time to engage in volunteer legal service to the public. |  |

1. **Transition into a Modern Representation Practice**

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| Action | Mark completed items |
| **Complete at least two of the following:** |  |
| **THE CARROT** One of the most important factors to assess is the “carrot.” What are your needs? What draws you to practicing law differently and how deeply does it excite your interest? What does Mentee envision themselves doing other than their current practice, or who is someone who has the job they think they would like to have? Identify at least 3 factors and discuss courses of action. Determine the character or personality of your firm. Will your firm’s character be based on technological advancements, access to justice, predictable billing, an online presence, or other advantages?  Use the “carrots” to help guide Mentee into practice areas or providing legal services in a manner that are better matches for their personalities. |  |
| **THE STICK** Another important factor is the “stick.” The stick is whatever it is you are trying to get away from in your current work world. Your stick might be a difficult partner, the stress of trial work, the billable hour, demanding clients, dealing with difficult opposing counsel, or a poisonous work environment. Identify 3 factors and strategies to overcome or engage these difficulties.  Caution: What if Mentee never liked the practice of law at all? What if Mentee became an attorney to please their parents, for example? Many attorneys enter the field because they are urged to do so by well-meaning significant people in their lives. What if Mentee is living out someone else’s dream? That is a stick with greater weight. Discuss Mentee’s “stick” in an effort to help Mentee make better understand why they are seeking change and whether the transition will truly help them obtain their carrot. |  |
| **GRIT** Next, there are a group of personality traits that indicate you have the motivation and tenacity to make a career transition. These traits include initiative, creativity, flexibility, endurance, and perseverance. These are the ingredients that compose what we call “grit.” Discuss with Mentee how hard they are willing to work to accomplish their goals and what personality traits they will invoke to find success. Identify at least 3 traits to develop and how to support them. |  |
| **ECONOMIC REALITY** Another factor that must be assessed is your economic situation. Help Mentee to explore, evaluate, and rank their priorities. Use those priorities to help Mentee establish short and long-term professional goals. Career transitions require a delicate balance of maintaining economic stability, while moving toward achieving professional goals. Discuss with Mentee how the economic realities of their situation inform their career transition. Create a spreadsheet of income, expenses, savings. Discuss short-term (0-3 months) and long-term (2-5 years) goals with a loose budget. |  |
| **EFFECTIVE OPPORTUNITY DEVELOPMENT** The last key piece to a successful career transition has to do with understanding and utilizing information about how to effectively develop opportunities and jobs. It is important to be prepared to have well-scripted, small vetting meetings with multiple people doing modern representation and practice area Mentee is trying to move into. The goal is to become known and trusted by people who are already in the industry or practice area; this is an effective way to become the “insider who gets hired.” Such an approach opens doors and develops potential jobs and other opportunities for the job-seeker. Attend 3 meetings/events with attorneys or stakeholders in the new practice area. Write a list of transferrable skills. Draft a resume and cover letter as an exercise to reflect on your skills and experience to prepare for these vetting meetings. |  |

**12. Developing a Competent Practice**

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| Action | Mark completed items |
| Evaluate how Mentee assess their legal competencies. As an outcome to this discussion, Mentee might develop an analysis of practice areas, matter types, client types, and Colorado judicial districts in which they feel “competent” to practice law. Create a plan for Mentee to routinely visit and update this “Zones of Competency” analysis. |  |
| Highlight areas where Mentee may not feel competent today, but wishes to improve competency over time. Generate a long term plan for Mentee to obtain necessary competencies in these areas of interest. |  |
| Assist Mentee in developing a short-term “Competency Plan” in the event that Mentee is approached to take on a matter or client outside of their scope of Zone of Competency. Included in this plan should be the educational resources, mentors, co-counselors, etc. Mentee can access to timely acquire the competency required. |  |
| Discuss the advantages of bar association involvement and discuss the many local, state, and national associations available, including any in Mentee’s specific practice area, as a means to develop referral relationships and networks. |  |
| Add Other |  |
| Add Other |  |

**13. Developing Lawyer Well-Being (complete at least two)**

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| Action | Mark completed items |
| 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” Mentee chose the profession of law and what Mentee seeks to accomplish in their professional role.   * What characteristics, skills, and attributes does Mentee have that will allow them to find professional success? * Who are the people in Mentee’s personal and professional community who will support them in finding professional success?   Assist Mentee in articulating their “Professional Identity” as a lawyer. Utilize John Bliss’ [The Professional Identity Formation of Lawyers](https://www.youtube.com/watch?v=afPxGz51Sy0) to assist your mentoring pair in facilitating this discussion. |  |
| Engage Mentee in a self-reflective exercise to determine whether Mentee believes they are thriving in all dimensions of “well-being,” including:  **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.  **Occupational:** Cultivating personal satisfaction, growth, and enrichment in work; financial stability.  **Intellectual:** Engaging in continuous learning and the pursuit of creative or intellectually challenging activities that foster ongoing development; monitoring cognitive wellness.    **Spiritual:** Developing a sense of meaningfulness and purpose in all aspects of life.  **Social:** Developing a sense of connection, belonging, and a well-developed support network while also contributing to our groups and communities.  **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.  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](https://www.americanbar.org/content/dam/aba/administrative/lawyer_assistance/ls_colap_well-being_toolkit_for_lawyers_legal_employers.authcheckdam.pdf) in building a well-being action plan. |  |
| Engage Mentee in a conversation about support systems. Who are their personal and professional support people? What additional support resources do they need? |  |

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| **Defining Professional & Personal “Success”**  Work with 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, 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.  **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.  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. |  |
| **Assessment Of Current Professional Identity**  Ask Mentee to answer the question “what do you do” to initiate the conversation about professional identity. Work with Mentee to expand the answer to the question to include a broader definition of Mentee’s strengths, interests, and professional passions. |  |

**14. Diversity, Equity, Inclusion, and Accessibility (Complete at least two)**

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| Action | Mark completed items |
| Discuss what diversity, equity, inclusion, and accessibility mean to both Mentee and Mentor and how these concepts manifest in the legal profession. This exercise is designed to create a safe space for conversation and the sharing of different perspectives on how the legal profession is incorporating these concepts and how it can continue to improve. Describe what an ideal practice and legal profession would look like based on these concepts. |  |
| Discuss the dimensions of identity for the Mentor and Mentee. Which identities are most salient for each person? Why? How have these identities served you in the legal profession? How have these identities led to challenge or limitation in the legal profession? |  |
| Discuss roadblocks and challenges the Mentee and Mentor may have experienced because of their underrepresented identities. What methods were taken to address these challenges? What resources were helpful? If there were any resources that would have been helpful but were not available, discuss what those are and how to best implement them in the future. |  |
| Engage one another in a reflective exercise to assess cultural empathy. Use the [Cultural Competence Self-Assessment Checklist](https://www.avma.org/sites/default/files/2020-08/Diversity-CulturalCompetenceChecklist.pdf) as a guide in your discussion. Discuss the ways in which cultural empathy are important to the practice of law and the building of community within the legal profession. |  |
| Attend a diversity awareness or training workshop or CLE together. Discuss the takeaways and next steps in applying what each participant learned.   * [CBA-CLE Equity/Diversity & Inclusion courses](https://cle.cobar.org/Practice-Area/Equity-Diversity-and-Inclusion) |  |
| Discuss various career paths such as Big Law, small firm, government, corporate, legal aid, and nontraditional legal positions and how they related to the Mentee’s personal and professional identities and professional goals.   1. Examine resources for underrepresented attorneys in the organizations or companies appropriate to Mentee’s career path. 2. Discuss how these paths might influence or support Mentee’s professional identity and goals. |  |

## Resources

**Videos**

* + - [Reimagining Law: DEI in the Legal Profession – What’s Working and What Isn’t](https://www.2civility.org/reimagining-law-dei-in-the-legal-profession/)
    - [Reimagining Law: Systemic Racism in the Legal Profession](https://www.2civility.org/reimagining-law-judge-ann-claire-williams-ret/)
    - [Reimagining Law: Supporting LGBTQ Legal Professionals](https://www.2civility.org/reimagining-law-moses-suarez-president-of-lagbac-chicagos-lgbtq-bar-association/)
    - [Reimagining Law: Creating a Sense of “Belonging” in the Legal Profession](https://www.2civility.org/reimagining-law-create-a-sense-of-belonging-in-the-legal-profession/)
    - [Reimagining Law: How Lawyers Can Combat Discriminatory Behavior](https://www.2civility.org/reimagining-law-how-lawyers-can-combat-discriminatory-behavior/)

**Articles**

* + - Commission’s most recent [DEI news and articles](https://www.2civility.org/news-updates/?_topics=diversity)
    - [Implicit Bias: Cloaked in Color-Blind Clothing](https://www.2civility.org/implicit-bias-color-blind-clothing/)
    - [Addressing Diversity Challenges in Law Firms](https://www.2civility.org/addressing-diversity-challenges-in-law-firms/)
    - [What Kids Can Teach Lawyers About Diversity and Representation](https://www.2civility.org/minorities-representation-legal-profession/)
    - [5 Things to Know About Lawyers with Disabilities](https://www.2civility.org/5-things-about-lawyers-with-disabilities/)
    - [3 Ways Lawyers Can Promote DEI and More with the CBA Racial Justice Coalition](https://www.2civility.org/3-ways-lawyers-can-promote-dei-and-more-with-the-cba-racial-justice-coalition/)
    - [Inclusive Language is Allyship](https://www.2civility.org/inclusive-language-is-allyship/)
    - [Unconscious Bias in Mentoring Relationships](https://www.2civility.org/unconscious-bias-in-mentoring-relationships/)
    - [Four Reasons You Need a Mentor](https://www.2civility.org/four-reasons-for-mentoring/)

**American Bar Association**

* + - [Bias Interrupters Project](https://www.americanbar.org/groups/diversity/women/initiatives_awards/bias-interrupters/) - You Can't Change What You Can't See: Interrupting Racial and Gender Bias in the Legal Profession
    - [Model Diversity Survey](https://www.americanbar.org/content/dam/aba/administrative/racial_ethnic_diversity/aba/credp_2020_mds_report.pdf) from the Commission on Racial and Ethnic Diversity in the Profession
    - [Implicit Bias Videos and Toolkit](https://www.americanbar.org/groups/diversity/resources/implicit-bias/) from the ABA Diversity and Inclusion Center

**The Institute for Inclusion in the Legal Profession (IILP)**

* + - [Where We Stand: Real Change. Now.](https://theiilp.wildapricot.org/)

1. **Integration and Development of “Whole-Person Lawyering”**

|  |  |
| --- | --- |
| Action | Mark completed items |
| **Complete at least two of the following:** |  |
| This component of the Mentoring Plan addresses the unique contribution of the mentee to the legal profession while working with the mentor to shape an approach that expresses the whole person as a lawyer. The discussion should focus on how the unique interests, history, and talents of the mentee influence the mentee’s perspective and how this perspective affects their practice of law. Suggested discussion topics are below: |  |
| * What are your values and how do these fit with your choice to become an attorney? How is this expressed in your practice? |  |
| * Do you have a spiritual context, such as a particular religion, nature or the outdoors, or philosophy? How does this impact why and how you practice law? |  |
| * What are your hobbies and how do they connect with your professional life? Do you use them to offset stress? Do your hobbies directly relate to your practice? How do your hobbies reflect why and how you practice law? |  |
| * What are your talents that express the most essential parts of your personal identity? Do you feel like you are fully expressing all the components of your perspective and experience in life? How do you think doing so would affect why and how you practice law? |  |
| * What are the key relationships in your life? How are they integrated into your professional life? |  |
| * What would be your ideal in integrating your personal life with your professional life? Or are these interests best served separately? Or a combination of both? |  |
| * How does your history affect the reason why you chose to be a lawyer? How does it affect your practice today? |  |
| * How do your hopes and dreams for the future affect your professional decisions? |  |
| * At the end of your career, what would you like to have accomplished? Has this changed over the duration of your practice? If so, how? |  |
| * Do an activity related to the mentee’s personal interests. |  |