

**UNIFORM MENTORING PLAN**

DATE OF COMPLETION	ACTIVITY TO BE PERFORMED
	<b>A. INTRODUCTION TO BAR AND LEGAL SYSTEM PARTICIPANTS</b>
	A1. Meet at the Mentor’s office to become acquainted with each other. If the new lawyer works in a different office than the Mentor, the mentor should introduce the new lawyer to other lawyers and staff at the Mentor’s office. If they work in the same office, the Mentor should either provide introductions or ensure that they have already occurred.
	A2. Attend a meeting together of a local bar association or similar lawyer’s organization and discuss opportunities to participate in the work of local, state, or national bar organizations.
	A3. The Mentor should introduce the new lawyer to other lawyers in the community.
	A4. The Mentor should escort the new lawyer on a tour of the local courts and, to the extent practicable, introduce the new lawyer to judges and court personnel.
	A5. If the new lawyer is likely to undertake any criminal defense representation, the Mentor should escort or arrange for another lawyer to escort the new lawyer to the local jail and explain procedures for jail visits. The Mentor should also introduce the new lawyer to local prosecutors and staff in the prosecutor’s office.
	A6. The Mentor should acquaint the new lawyer with the court appointment process, with pro bono expectations, and with various legal services organizations that provide services to indigent persons.
	<b>B. GENERAL PROFESSIONAL VALUES, BEHAVIOR, AND EDUCATION</b>
	B1. Have a meaningful discussion of the Lawyer’s Oath and of the practical application of the concepts in the oath.
	B2. Discuss the importance of continuing education throughout a lawyer’s career.
	B3. Discuss customs, unwritten rules and other expectations of etiquette and behavior among lawyers and judges in the community.

	C. AVOIDING COMMON ETHICAL/CIVIL LIABILITY PROBLEMS
	C1. Discuss common reasons for the filing of grievances or malpractice complaints, especially negligence and conflicts of interest, and how to recognize and avoid common problems. If the new lawyer works in a different office than the Mentor, the Mentor should advise the new lawyer to ensure that his or her office has an appropriate system to identify potential conflicts of interest. If they work in the same office, the Mentor should ensure that the new lawyer understands how the firm's conflict identification system operates.
	C2. Discuss available resources to resolve complicated ethical issues, including, when applicable, the process for consulting a law firm's ethics committee.
	C3. Discuss how to address situations in which the new lawyer believes that another lawyer has committed an ethical violation or in which the new lawyer believes that he or she has been instructed to engage in unethical behavior.
	C4. If the new lawyer is in-house counsel for a company or staff counsel for an agency, discuss the identity of the client and the duties owed to the entity.
	C5. Discuss all applicable rules regarding trust account management and emphasize the importance of keeping accurate records of property of others held by the lawyer. The Mentor should advise the new lawyer in detail as to when funds generally may be disbursed. If the new lawyer works in a different office than the Mentor, the Mentor should advise the new lawyer to create appropriate trust accounts. If they work in the same office, the Mentor should ensure that the new lawyer understands how the firm's trust accounts operate.
	C6. Discuss duties to supervise non-lawyer staff and discuss what activities a non-lawyer staff member or employee may engage in without undertaking the unauthorized practice of law.
	C7. Discuss when and how it is appropriate to contact a judge's office, with particular emphasis on avoiding impermissible contacts. Also discuss the lawyer's duty of confidentiality and common pitfalls regarding protection of the attorney-client privilege.
	C8. As appropriate to the practice setting, discuss methods for creating accurate records of time spent on a client's matter.
	C9. Discuss time management skills and techniques as well as the desirable features of a calendaring or tickler system.

	<b>D. CARING FOR ONE’S SELF AND HANDLING PERSONAL ISSUES</b>
	D1. Discuss how to handle office politics and how to develop appropriate support systems of persons with whom the lawyer can discuss problems when they arise.
	D2. Discuss the new lawyer’s long-term career objectives and how best to achieve them. If appropriate to the practice setting, also discuss the importance of developing a long-term business plan.
	D3. Discuss finding a balance between one’s personal and professional responsibilities. Discuss the warning signs of substance abuse or depression and how to address those problems when they are manifested in oneself or in others.
	D4. Discuss practical ways to manage long-term debt, including educational loans.
	<b>E. RELATIONSHIPS WITH CLIENTS AND OTHER PARTIES</b>
	E1. Discuss how to evaluate a matter and decide whether you should undertake the representation. If in a prosecutor’s office, discuss the appropriate considerations in making charging decisions.
	E2. If appropriate to the practice setting, discuss how to set and memorialize a fee and how to talk with the client about a fee for a matter.
	E3. Discuss how to communicate with and involve a client effectively in a matter. If in a prosecutor’s office, discuss appropriate interaction with victims.
	E4. Discuss how to behave during a deposition and in court. If a new lawyer participates in a deposition or court proceeding during the mentoring period, the mentor should either observe the new lawyer’s performance or discuss the experience with the new lawyer afterwards.
	E5. Discuss appropriate negotiation techniques, focusing on expectations of behavior during negotiations as well as the effectiveness of various approaches.
	E6. Discuss typical problems that may arise between a lawyer and client and how to avoid or deal with those situations.
	E7. Discuss how to communicate effectively with counsel representing other parties in a matter.
	E8. Discuss how to terminate a representation.