

BCBA Mentorship Program

Suggested Model Mentoring Plan



Name of Mentee: _____

Name of Mentor: _____

Goals of Mentoring Program:

To provide professional guidance and counsel to assist the Mentee in acquiring the practical skills, judgment, and professional values necessary to practice law in a highly competent manner.

Mentorship will afford the mentees meaningful access to an experienced lawyer mentor equipped to teach practical skills, seasoned judgment, and sensitivity to ethical and professional values that represent the best traditions and high aspirations of the legal profession.

The Mentoring Plan:

Although great flexibility in designing each particular plan is warranted, the plan should foster discussion and implementation of professional skills and values. At a minimum, the Mentoring Plan should include the following key elements:

- A. Regular contact and meetings between the Mentor and Mentee.
- B. Continuing discussions between the Mentor and Mentee on at least the following topics:
 - (i). Ethics and professionalism.
 - (ii). Relationships with clients, other lawyers (both in and outside the firm), the judiciary and the public, including unrepresented parties.
 - (iii). Professional work habits, organizational skills, and practice management.
 - (iv). Economics of practicing law in the relevant practice setting.
 - (v). Responsibility and opportunities for pro bono work, bar activities, and community service.
- C. Introduction to the local legal community.
- D. Specific planning for professional development and continuing legal education.
- E. Periodic evaluation of the Mentor-Mentee relationship.
- F. The following activities and experiences are intended to serve as a guide to assist the Mentor and Mentee in jointly developing a specific plan of activities to be completed over the course of the mentoring relationship. The particular Mentoring Plan should incorporate as many of these activities and experiences as feasible while being adjusted to the particular practice setting and individual needs. Using this Model Mentoring Plan as a checklist, the Mentor and Mentee should jointly develop a Mentoring Plan for the coming year.

At the end of the mentoring year, the Mentoring Plan will serve as the evaluative tool to assist in determining if the mentorship experience was satisfactory. A Mentor whose area of practice is other than litigation and trial work may choose to call on another experienced lawyer who practices in this area to assist in mentoring the Mentee in the area of the Advocacy Experiences.

ACTIVITY OR EXPERIENCE	
A. Introduction to the Legal Community	
1.	The Mentor should contact the Mentee as soon as practicable after receipt of the notice of assignment and arrange to meet. The Mentor should introduce the Mentee to other lawyers and staff members at the Mentor's office.
2.	Introduce as feasible the Mentee to other lawyers in the community through attendance at local bar association meetings/events or otherwise.
3.	Escort the Mentee on a tour of the local courthouse(s) and, to the extent practicable, introduce him or her to members of the judiciary, court personnel, and clerks of court.
4.	Discuss any "unwritten" customary rules of civility or etiquette among lawyers and judges in the community.
5.	Acquaint the Mentee with Legal Aid, PA Legal Services, and opportunities for lawyers in private practice to engage in pro bono activities.
B. Introduction to the Community at Large	
1.	Invite the Mentee to attend a civic club of which the Mentor is a member or some other community service activity in which the Mentor participates.
2.	Discuss civic, charitable, and service opportunities in the community.

ACTIVITY OR EXPERIENCE	
C. Introduction to Law Office Management	
1.	The Mentor should take the Mentee on a tour of the Mentor's office and demonstrate and explain how the following items of law practice management are used and handled in the Mentor's office, if applicable/feasible.
(a)	Time Records
(b)	Records of client-related expenses
(c)	Billing system
(d)	Escrow or Trust Account and handling of funds belonging to client
(e)	Filing System
(f)	Document Retention Plan
(g)	Calendar and "Tickler" or Reminder System
(h)	Information Technology Systems
(i)	Library and Research Systems
(j)	Other resources (publications, seminars, equipment, etc.) that a Mentee might find particularly helpful in his or her work
(k)	Discuss good time management skills and techniques
(l)	Discuss practices to maintain client confidentiality
(m)	Discuss roles 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

ACTIVITY OR EXPERIENCE	
D. Working With Your Client	
1.	Discuss Topical Questions and cover items of Practical Guidance set out in Appendix D, Working With Your Client
2.	Discuss how to gather information about a legal matter and appraise credibility and trust
3.	Discuss how to screen for, recognize, and avoid conflicts of interest.
4.	Discuss how to decide whether to accept a proffered representation
5.	Discuss the use of retainer or engagement letters and define the scope of the representation
6.	Discuss how to talk about and set the fee for legal services
7.	Discuss how to deal with a “difficult” client
8.	Discuss “DO’S and DON’TS” of maintaining good ongoing client relations, such as returning telephone calls and keeping the client informed about matters.
9.	Discuss terminating the lawyer-client relationship and necessary documentation

ACTIVITY OR EXPERIENCE	
E. Suggested Advocacy Experiences	
The Mentor should monitor and facilitate the progress of the Mentee in observing the following Advocacy Experiences and by discussing, or arranging for another experienced lawyer to discuss the context and assess the event observed:	
1.	Deposition of a witness or adverse party in a civil action
2.	Jury trial in a civil or criminal case in either a state or federal court
3.	Non-jury trial or evidentiary hearing, in the magisterial district court, state or federal court
4.	An actual or webcast of an appellate argument in the Supreme Court of PA, the Superior Court of PA, the PA Commonwealth Court, a United States Circuit Court of Appeals, or the Supreme Court of the United States
5.	Mediation
6.	Arrange for the Mentee to observe an arbitration and discuss (or arrange for an experienced lawyer to discuss) the arbitration observed and provide relevant background context and evaluate what is observed.
7.	Arrange for the Mentee to observe a judicial-type hearing conducted by a state or local administrative body (e.g., local zoning board; tax equalization board hearing; state licensing or regulatory board) and provide relevant background context and evaluate what is observed.
F. Closings and Transactional Work	
Arrange for Mentee to observe a real estate or other business transaction or financial closing and explain the relevant background.	

ACTIVITY OR EXPERIENCE	
G. The Obligations of Attorneys to Others	
1.	Discuss Topical Questions and cover items of Practical Guidance set out in Appendix D, Acting for Your Client
2.	Discuss “A Lawyer’s Creed” (attached) and how one as a lawyer can use the law and legal process as “instruments for the common good.”
H. Negotiation	
1.	Discuss pertinent questions raised by the Topical Questions and Practical Guidance in Appendix D, Negotiating for Your Client, such as:
	(a) How to prepare for the negotiation of a legal matter (e.g., release of a personal injury claim, lease agreement, etc.)
	(b) When and how negotiation should be initiated
	(c) How to involve the client in negotiation
	(d) How to negotiate with an attorney with years of experience, a friend, etc.
	(e) Ethical and professional obligations of negotiators
	(f) Skills needed to be an effective negotiator and how to acquire them
2.	Arrange for Mentee to observe a negotiation and explain the relevant background context, and then evaluate what is observed, if feasible

Mentoring Plan Pledge

The undersigned Mentor and Mentee hereby agree upon the Mentoring Plan (“Plan”) of suggested activities and experiences set out above. They pledge that they will use their best efforts to carry out the Plan in a manner that fulfills the purpose of the Mentorship Program in assisting the Mentee to acquire the practical skills, judgment, and professional values to practice law in a highly competent manner.

By signing this Pledge, the undersigned Mentor and Mentee pledge that they will devote the time and effort necessary to achieve these goals.

Print Name of Mentor

Date

Sign

Print Name of Mentee

Date

Sign

This Mentoring Plan Pledge should be signed by both the Mentor and the Mentee and returned to the BCBA within thirty (30) days after the start of the mentoring year.