

SELF-DIRECTED STRUCTURED MENTORING PROGRAM GUIDE

Introduction

The MCLE Board approved this *Self-Directed Structured Mentoring Program Guide*¹ to assist and support Mentors and Mentees in developing mentoring relationships that meet the requirements and intent of APR 11, making those who participate eligible to obtain MCLE credit. Mentors and Mentees may earn MCLE credit at the rate of one credit per each 60 minutes of mentoring, provided that the mentoring is done through an Approved Structured Mentoring Program or by using this *Self-Directed Structured Mentoring Program Guide*.

Purpose of Mentoring

Mentoring creates an opportunity for a Mentor to provide professional guidance and share practical knowledge and skills with a Mentee in order to:

1. Foster professionalism, civility and collegiality in the legal community;
2. Bridge the gap for new and transitioning attorneys;
3. Promote inclusion and eliminate bias with respect to the practice of law;
4. Encourage professional development, including insights into the practice of law;
5. Encourage personal development, including the need for healthy work-life balance and awareness of mental health, addiction, and stress issues; and
6. Support the community through public service.

Program Guidelines

1. Eligibility

The Mentor and Mentee must be active members of the WSBA. In addition, the Mentor must be a member in good standing who has been admitted to the practice of law in Washington for at least five years.

2. Orientation

Orientation is mandatory for all Mentors and Mentees wishing to attain MCLE credit. The orientation itself is not eligible for credit. The orientation should consist of an initial meeting designed to review the documentation that must be completed in order to satisfy the MCLE Board requirements and to ensure that the Mentor and Mentee agree upon and are clear about the mentoring relationship, purpose, and how they expect the

¹ The content of this *Self-Directed Structured Mentoring Program Guide* was modeled on the Mentoring Plan developed by the Illinois Supreme Court Commission on Professionalism, as well as the Washington Leadership Institute Mentoring Plan but has been modified to fit the goals developed by the MCLE Board.

requirements to be met. At the orientation meeting the Mentor and Mentee must sign a *Mentoring Agreement* defining the parameters of the mentoring relationship and create a *Mentoring Plan* which will serve as a guide for all subsequent meetings. Although not required, in-person orientations are strongly encouraged as the orientations serve as a starting point in developing the mentoring relationship.

3. Mentoring Plan

The *Mentoring Plan* defines the learning curriculum to be carried out during the mentoring relationship. The attached approved *Mentoring Plan* template outlines core concepts and skills that the Mentor and Mentee can choose to incorporate when developing their own *Mentoring Plan*.

Within each category the learning subjects may be customized to the particular practice setting, individual needs, and personal development. All categories of the *Mentoring Plan* contain blank lines to allow the Mentor and Mentee to substitute or add other topics of interest from among the APR 11(f) approved subjects. To the extent interests or needs change during the course of the mentoring relationship, additions, deletions or substitutions may be made to the original *Mentoring Plan*.

The *Mentoring Plan* will guide the activities and meetings between the Mentor and Mentee. Although interactions may occur through a variety of means, face-to-face meetings, whether in person or via electronic media, are strongly encouraged.

4. MCLE Credit

At the end of the mutually agreed upon mentoring term, or at any time during the mentoring relationship, the Mentor and Mentee may individually apply for MCLE credit via mywsba.org. Mentoring for MCLE credit is only approved for “other” and “ethics” credits. A copy of the completed *Mentoring Agreement*, *Mentoring Plan* and *Mentoring Evaluation* must be submitted at the time MCLE credit is sought.

5. Mentor and Mentee Checklist

- ✓ Participate in an orientation meeting, which is not eligible for MCLE credit, at which the Mentor and Mentee will:
 - Sign *Mentoring Agreement*, and
 - Develop a personalized *Mentoring Plan*
- ✓ Implement the *Mentoring Plan*
- ✓ Fill out an *Evaluation* about the mentoring experience
- ✓ Apply for MCLE credit via mywsba.org

Available Forms:

1. Mentoring Agreement
2. Mentoring Plan
3. Mentoring Evaluation

MENTORING AGREEMENT

We, _____, Mentor, and _____, Mentee, agree to participate in the Self-Directed Structured Mentoring Program in accordance with the terms of this agreement. We understand the goals of mentoring include:

- Foster professionalism, civility and collegiality in the legal community;
- Bridge the gap for new and transitioning attorneys;
- Promote inclusion and eliminate bias with respect to the practice of law;
- Encourage professional development, including insights into the practice of law;
- Encourage personal development, including the need for healthy work-life balance and awareness of mental health, addiction, and stress issues; and
- Support the community through public service.

We acknowledge and will abide by the following rules:

- Any communication between Mentor and the Mentee is not intended to be the rendering of legal or professional advice to the Mentee or his or her clients, and the Mentee will not rely upon such communications or cause any client to rely upon them.
- No confidential or attorney-client relationship is formed between Mentor and the Mentee as a result of participation in mentoring. Neither the Mentee nor Mentor will identify any client or reveal any client confidence to the other, nor will either seek professional or legal advice from the other about specific legal matters or clients. Instead all discussions about substantive legal matters between the Mentee and Mentor will be limited to hypothetical situations.
- Mentor is not assuming any liability or responsibility with respect to any legal matter of the Mentee's clients, nor will the Mentor render professional services to, or take any responsibility either directly or indirectly for any aspect of representation of the Mentee's clients.
- Mentor will not co-counsel any matter with the Mentee, nor will Mentor make referrals to or accept referrals from the Mentee during the term of their mentoring term.
- The Mentor and Mentee will not be employed by the same employer.

We hereby certify that we have read the above *Mentoring Agreement* and agree to its terms.

Mentor Signature: _____

Date: _____

Mentee Signature: _____

Date: _____

MENTORING PLAN

a) Substantive Law

Elected	Action	Completion Date
	Discuss the following substantive law subjects:	
	Discuss practice skills such as taking depositions, trial techniques, and interviewing clients.	
	Other:	
	Other:	

b) Ethics and Professional Responsibility

Elected	Action	Completion Date
	Discuss practices to maintain client confidentiality.	
	Discuss how to screen for, recognize, and avoid conflicts of interest.	
	Discuss the responsibilities of the client and the attorney in decision-making, and the best ways to involve a client in their case.	
	Discuss preparation and proper behavior 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 common malpractice and grievance traps in your practice area or setting, and how to recognize and avoid common pitfalls.	
	Discuss potential resources and procedures for dealing with complicated ethical issues, including conflict of interests.	
	Discuss appropriate ways to handle situations where an attorney believes another attorney has committed an ethical violation; the obligation to report misconduct; and the appropriate way to handle a situation where a Mentee is asked by a senior member of the firm/organization to do something that is unethical or unprofessional.	
	Discuss the grievance process and an attorney's duty to cooperate with a disciplinary investigation.	
	Other:	
	Other:	

c) Professional Development

Elected	Action	Completion Date
	Discuss professional skills including effective lawyering, leadership, career development, communication and presentation skills.	
	Discuss various career paths such as large firm, small firm, government and non-profit practice, corporate counsel, and nontraditional legal positions and identify resources for exploring options.	
	Discuss long term and short-term career objectives and identify ways to achieve them.	
	Other:	
	Other:	

d) Personal Development and Mental Health

Elected	Action	Completion Date
	Discuss strategies for finding a balance between career and personal life, keeping daily stress in perspective, reconciling job expectations with actual experience and maximizing career satisfaction.	
	Discuss prominence of substance abuse and mental health issues in the legal profession; review warning signs of substance abuse or mental health problems; what to do if the Mentor, Mentee a colleague, or a superior is faced with a substance abuse or mental health problem; and the resources for assistance.	
	Other:	
	Other:	

e) Office Management

Elected	Action	Completion Date
	Discuss the following office management matters:	
	Discuss business planning, financial management, and office technology.	
	Discuss practice development and marketing, client relations, employee relations and responsibilities when opening or closing an office.	
	Other:	
	Other:	

f) Improving the Legal System

Elected	Action	Completion Date
	Discuss types of alternative dispute resolution such as mediation, arbitration, early neutral evaluation, summary jury trials, and collaborative representation.	
	Acquaint Mentee with access to justice issues, various Washington legal services organizations, and opportunities to engage in <i>pro bono</i> activities.	
	Develop an awareness of diversity and inclusion issues in the legal profession by reading recent published studies and articles, and discussing them.	
	Other:	
	Other:	

Mentoring Plan Pledge

We, _____, Mentor, and _____, Mentee, agree upon this *Mentoring Plan* of activities elected above. We pledge that we will devote the time and effort necessary to carry out this *Mentoring Plan*.

Mentor Signature _____ (Bar Number) _____ Date

Mentee Signature _____ (Bar Number) _____ Date

MENTORING EVALUATION

Name: _____ Date: _____

1. Are you the Mentor or Mentee?

Mentor

Mentee

2. Was the orientation helpful in beginning your mentoring relationship? Explain.

3. How many in-person meetings have occurred to date?

4. Does your mentoring relationship support open communication and learning? Explain.

5. Did you encounter any difficulties completing the selected activities in your mentoring plan? Explain, and describe how you resolved these difficulties.

6. Are you benefiting from this mentoring relationship? Explain.

7. Is there anything else you would like to share?

MENTORING EVALUATION

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