The Paths Mentorship Program

Orientation Guide

Overview

The orientation is the mentoring pair's first meeting. During this meeting, the mentor and mentee discuss their expectations and goals, and they plan their activities for the mentoring term. This guide is designed to be used by mentors and mentees in preparation of their first meeting to facilitate a discussion from which they can create a mentoring plan.

Before the Meeting

The initial meeting will be more productive if mentors and mentees come prepared. Mentees and mentors can prepare for the initial meeting by:

- Learning about their partner prior to the meeting.
- Mentees should consider how their mentor's professional experience can help them develop as a lawyer, keeping in mind their own professional goals.
- Review the mentoring plan template available on the PMP website prior to the meeting and identify activities listed on the template that they would like to include in the plan.
  - Mentors may wish to consider activities and topics that they believe are a good match for the Mentee's skills and experience and add new activities or topics that they believe would be helpful.
  - Mentees should identify activities and topics that best align with their career goals.
  - Mentors and mentees can bring this information with them to their first meeting.
- Review initial meeting goals below and be prepared to complete a mentoring plan.

<u>Note that all activities that are included in the participants' mentoring plan must conform to APR 11(f) to qualify for CLE credit.</u>

During the Meeting

Below are a list of topics that mentors and mentees may wish to cover during their initial meeting. These topics are only suggestions. If participants are seeking CLE credit, the mentoring agreement must be signed during the meeting, and the mentor and mentee must create a mentoring plan.

Suggested topics to discuss during the initial meeting:

- If the mentor has experience as a mentor or mentee, this is a good time to discuss how those experiences benefited the mentor.

- Mentors and mentees should talk about their educational backgrounds and professional experience. The initial meeting is an opportunity for the mentee to ask questions and learn from their mentor's experiences.

- Mentees should talk about their career goals. What area of tax law is the mentee interested in pursuing? What experience does the mentee have with tax law? Why is the mentee interested in tax law instead of another area of law? Where do mentees see themselves in five or ten years?

- Discuss your availability and develop a schedule. Is there a period during the year when the mentor or mentee is particularly busy? If so, create a schedule that takes these busy time periods into account.

- Develop a mentoring plan using the template provided on the PMP website. Discuss which activities and topics you would like to include in the plan and talk about adding any topics that would be helpful. Organize the topics and activities selected according to the schedule that was created earlier.

- Establish rules for the mentoring relationship, such as preferred means of communication (e.g., by phone or email).

- Discuss the possibility of conflict and how you will communicate with each other in the event that a conflict does arise.

- Review and complete the mentoring agreement and the mentoring plan.