

MENTORSHIP PROGRAM TOOLKIT

*A Programming
Guide for the
Legal Profession*



Mentorship Program Toolkit

Created by the
Washington State Bar Association
Mentorship Program

1325 4th Ave, Suite 600. Seattle, WA 98101
(800) 945-9722

mentorlink@wsba.org

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Mentorship Program Toolkit

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Program Toolkit

This Toolkit aids organizations in creating mentor/mentee relationships, whose purpose is to share professional guidance, practical knowledge, and essential skills. By furthering mentor/mentee relationships, this guide strives to:

1. Foster professionalism, civility, and collegiality in the legal community.
2. Bridge the gap for new and transitioning legal professionals.
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 life-work balance and awareness of mental health, addiction, and stress issues.
6. Support the legal community through public service.

This icon represents relevant worksheets or tools that are available for download or can be viewed in the back of this toolkit.



This Toolkit is divided into five segments that include best practices templates and checklists. The Toolkit and accompanying worksheets are based on programs throughout the country with varying mentorship opportunities. This is a best practice tool for your organization to use and modify based on the needs of your unique programming.

A Commitment to Diversity, Equity, and Inclusion

The Washington State Bar Association is committed to advancing diversity, equity, and inclusion. To promote a sense of belonging especially for members who are marginalized and underrepresented, the WSBA promotes and supports mentorship programs. One of the underlying goals of mentorship programs is to support legal professionals so they enter, stay and thrive in the profession. This Toolkit integrates best practices for developing an inclusive program. See Section I. Program Design for more information.

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PROGRAM DESIGN

For the purposes of this Toolkit, we will cover the most important elements as they pertain to mentorship programming: scope, time, and resources. There is also a list of resources at the end of this Toolkit that provide further instructions on how to design and manage a program. When designing your program consider the following questions:

Program Design

- What is the need for a mentorship program in your organization?
- What is the scope of the program? (Are you looking for a full long-term matching design or creating one-time mentorship experiences? If so, review the mentor/mentee application templates for guidance.)
- How does this program fit within your mission, vision, and strategic goals?
- Who is the main audience for this program? Mentor, mentee or both?

Diversity, Equity, and Inclusion Considerations

- How do you create a program that is inclusive for members of underrepresented and marginalized members including Black Indigenous and other people of color, women, people from the LGBTQIA2S community, and people with disabilities?
- Will the program include mentoring that brings together mentors and mentees with differing social identities?
- Will you be providing training, coaching, or guidance in crucial conversations?

Analysis of Cost/Staffing and Impact

- What are the parameters, risks, and dependencies associated with this program?
- What type of time/capacity will be needed to operate this program (who is staffing this program)?
- What is the projected staffing cost to develop this type of programming?
- How will you know if the program is making an impact? How are you defining impact/success?



Mentorship Program Project Plan documents will help you think through these questions and design a timeline for implementation.

Diversity, Equity, and Inclusion

Diversity is an important element of any mentoring program. WSBA defines diversity as meaningful representation of and equal opportunities for individuals who self identify with those groups that are underrepresented in the legal profession based upon, but not limited to disability, gender, age, familial status, race, ethnicity, religion, economic class, sexual orientation, gender identity and gender expression.

Social conditioning informs our ideas, perceptions, stereotypes, and assumptions of these various groups, especially those that are different from our own. It is important to take into consideration the challenges of communicating across difference.

A strong mentoring program ensures that participants understand the influence of history, systems, and policies on the social construction and differential treatment of different groups based upon race, gender, disability, etc.

Acknowledging how factors might influence one's automatic assumptions about someone, and taking steps not to act upon those assumptions are critical to building healthy and sustainable mentoring relationships.

Moreover, a mentoring program should seek to understand and address the issues related to power and privilege across lines of difference and the effects that may have on the mentoring relationship.

For steps to facilitate this discussion refer to this worksheet:



**Three Steps to Deepening the Dialogue and
Building Healthy Relationships**

2 MARKETING AND RECRUITMENT

How you recruit will depend on the type of mentors and mentees you want and the type of commitment each is looking for, or the requirements you design for your program.

Example: If your organization supports immigrant issues, you could email flyers to organizations that work directly with the immigrant community and use list serves that address immigration issues. We also recommend advertising to new legal professionals and those who have a solo or small firm practice. These legal professionals could be great mentors and mentees.

Recruiting and retaining mentors is a challenge that organizations across the country experience. Therefore, recruitment needs to heavily center on mentors. Creating a pathway for mentees to become future mentors is essential. To aid with recruitment refer to these flyers:



Am I Ready to Be A Mentor



Quick Tips for Seeking Mentors and Advisors

Both flyers provide questions for mentors/mentees to consider before participating.

3

SCREENING AND PLACEMENT

Matching a mentor and mentee is critical to a successful relationship. Creating a good application and using an application process are best practices. You should include in the placement process someone who has been in your organization for a while and knows the mentors and who could help with suggesting placement options. The process informs the matching and screening of your volunteers, giving you the information you need to make a good match. Sample templates for:



Mentor Application and



Mentee Application are included in this packet.

Remember, these are templates that you may want to modify by deleting and adding certain questions.

Clearly defining the roles of the mentors and mentees is very important in the screening and placement process. This ensures that everyone understands their part in the match and there is no confusion or miscommunication. For example:

- The mentor can be available for professional development or substantive law coaching.
- The mentor is not a professional counselor or a co-counsel on a case.
- The mentee needs to clearly express what they are expecting in a mentor.
- The mentee should not expect the mentor to find the mentee employment.

4

ORIENTATION AND TRAINING

An introductory orientation is strongly recommended for all mentors and mentees and required for MCLE accredited programs. The orientation would consist of an initial meeting so that the mentor and mentee can be clear about the mentoring relationship, purpose, and expectations. The mentorship program orientation meeting is not eligible for MCLE credit.

In-person orientations are strongly encouraged since the orientation serves as a starting point in developing the mentoring relationship. In-person orientations also allow the mentor and mentee to ensure they are a good match. We recommend creating written materials that supplement the information presented.

Additional Materials for Orientation



Mentorship Curriculum Guide—includes worksheets to help mentors and mentees identify their goals.



Mentoring Agreement—defines the parameters of the mentoring relationship.



Mentoring Plan—serve as a guide for all subsequent meetings.

For those interested in pursuing MCLE credit, reference the *Self-Directed Structured Program Mentoring Guide* at www.wsba.org/docs/default-source/licensing/mcle/self-directed-structured-mentoring-program-guide.pdf?sfvrsn=73e73af1_8.

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ONGOING SUPPORT AND MANAGEMENT

Not all matches work out. Your program may need to consider how to manage when a mentor or a mentee aren't good for one another. Below are some points to consider when managing this type of volunteer relationship.

Prevent Over-Involvement in the Match

Create a list serve for easy communication between you and the matches, as well as the matches with each other. Promoting resources, meet-ups, CLEs, or events where matches would find opportunities to engage and connect are appropriate uses of the list serve. Registering for a CLE, however, is the match's responsibility.

Managing Volunteer Relationships

As noted in this *Toolkit*, working with volunteers when either the match isn't working or the volunteer may not be a fit for your program is probably the hardest part of running a mentorship program. Below are best practices for when you need to reassign matches or encourage a mentor/mentee to revisit their motivations and availability.

What Happens When A Match Doesn't Work Out?

Supporting the mentorship match when either the mentor/mentee stops communicating or just isn't working is the most difficult part of running a mentorship program. The right policy, communication, and procedures will help you manage the process and not the volunteers.

Dissolving a Match

The match needs to know what to do and what support you will give if issues arise with their mentor/mentee. Best practices include:

- **Flag:** The mentor/mentee should approach you right away to avoid an irreparable relationship between the pair itself and between the mentor/mentee and you, as the organization.
- **Coach:** Encourage the mentor/mentee to talk with their match to respectfully discuss the challenges.
- **Facilitate:** If the discussion doesn't resolve the issues, work with the match to try and reconcile problems.
- **Reassign:** If it is still not working, the mentor/mentee should contact you and ask for a new match.
- **Exit Evaluation:** Ask the match to complete the evaluation giving the reason what did/did not work (confidentially) to have a stronger chance that the next partnership will be successful. This will also give you feedback on how to make the program better.
- **New Connections:** Work with the mentor/mentee to find a new match.

Mentorship Match Best Practices

Mentorship Match

Best Practices

A Mentor Withdraws

If a mentor, due to unforeseen circumstances, needs to withdraw their involvement completely, the following steps are suggested:

- **Thank:** The mentor dedicated time and resources to your program. Be sure to thank them for their participation.
- **Exit Evaluation:** The evaluation will provide valuable information on how to improve your program.
- **Ask:** Inquire if the mentor knows of any other potential attorneys who would be willing to volunteer.
- **Remove:** Once a mentor asks to withdraw from the program, remember to remove them from your active list.
- **Reassign:** Connect with the mentee to understand what was working and what they may need in a mentor.

Ending a Relationship With a Mentor or Mentee

Remember that a low-performing volunteer can be just as detrimental to an organization as an employee. The unsuitable relationship can cause mistrust, low morale, and a dissatisfying experience overall for everyone. A volunteer may not work out for a wide variety of reasons such as:

- Having different goals.
- Having different opinions.
- Misunderstanding of the policies/expectations.

Prevention Is Key: The first step is to clearly outline the requirements and expectations in the *Mentoring Agreement*. This allows you to have a record of the shared agreement affirming that the mentor understands and will abide by the established requirements and expectations.

You may have additional program requirements that could include:

- A certain number of meetings.
- Regular communication, which should be defined by the matches, instead of you.
- Attendance at a particular training/CLE/event.
- Trial observation with post-discussion (remember, the trial cannot be affiliated with the mentor or mentee).

Mentorship Match

Best Practices

You also want to lay out expectations:

- The mentor/mentee must follow all of the policies, rules, and guidelines for mentorship.
- The mentor/mentee should respectfully remind the other if they are not adhering to policies, rules, or guidelines, (i.e., not speaking in hypotheticals, etc.).
- Professionalism, respect, and willingness to learn are essential. This includes working with your program and with each other.
- Following through with commitments to your organization and their match.
- Both individuals need to keep confidentiality with what is shared (remember, any client/case information must be hypotheticals).
- Harassment and discrimination are not tolerable.

Address: If someone breaks policies or expectations, talk to them respectfully. Assume the best in that person and be willing to give a second chance. It will be a difficult conversation. You owe it to the individual and your organization to find out why they broke with policy.

Decide: Do you need to dissolve the relationship or give a gentle reminder of policy and next steps if they continue to break policy and expectations?

Act: If you decide it is time to dissolve the relationship, act quickly, professionally, and firmly. Give the volunteer the opportunity to tell their match or use a mediator in order to prevent an uncomfortable encounter.

Additional Mentorship Programs and Resources

Please note: These resources are provided for reference purposes only.

501 Commons

www.501commons.org/resources/tools-and-best-practices/volunteer-management

Their Volunteer Management Guide contains articles, examples and templates that can help with volunteer management.

Colorado Attorney Mentoring Program

<http://coloradomentoring.org>

The CAMP website has a lot of helpful information geared towards matches and can be used to help run your program.

Energize, Inc.

www.energizeinc.com

Energize, Inc. provides training and consultation on volunteerism. Their website has a wealth of information on how to manage volunteers.

Leadership Council on Legal Diversity

www.lclldnet.org/programs/law-school-mentoring/mentoring-toolkit

The LCLD website contains a template that could be useful for the match to fill out at the Orientation and additional helpful tips for the mentor and mentee.

Foster Garvey

www.foster.com/ourfirm-diversity-mentorship

Foster Garvey's is in collaboration with several Washington-based minority bar associations, as well as the Washington State Bar Association to pair law students/new lawyers with mentors who been historically marginalized with mentorship opportunities.

Legal Mentor Network

www.legalmentornetwork.org

Legal Mentor Network is the first nation-wide, free mentorship program for law students. The goal is to provide every mentee with at least two mentors. The mentee/mentor relationship will focus on information, advice, guidance, and support.

Additional Mentorship Programs and Resources

UW Mentorship

www.law.uw.edu/careers/mentoring

The UW School of Law provides a number of mentorship opportunities for practitioners interested in connecting with law students. Professional mentors offer guidance and encouragement while facilitating networking and job shadowing opportunities.

National Legal Mentoring Consortium

legalmentoring.org/mentoring-programs

Through mentoring, new law lawyers and law students build practical skills while developing a sense of confidence, identity, and effectiveness in their professional role.

CLIO

www.clio.com/blog/legal-mentor

Whether you're a law student, recent graduate, or attorney with decades of experience, you can benefit from a legal mentor. There is always more to learn and someone with more experience or a different perspective, finding a legal mentor is a valuable opportunity for all lawyers.

Sara Williams

sarawilliamsesq.com/why-is-mentorship-so-important-in-law

Legal talent alone isn't sufficient for developing a successful law career. The legal profession is a challenging one, therefore mentorship is a valuable opportunity for helping lawyers cope with the professional challenges.

Oregon State Bar

www.osbar.org/nlmp/resources.html#4

Tips on creating effective mentoring relationships.

Washington State Bar Association Mentorship Resources

www.wsba.org/connect-serve/mentorship

WSBA provides information on mentoring opportunities that currently exist across our state's legal community, in addition to other mentoring resources to support WSBA members. The mentorship webpage also contains articles and links to programs in other states.

Mentorship Program Toolkit

Worksheets

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MENTORSHIP PROGRAM PROJECT PLAN

| | |
|--------------|--|
| Start | |
| Due | |
| Budget/Cost | |
| Who | |
| Stakeholders | |
| Dependencies | |
| Risks | |

PROGRAM DESIGN

- What is the need for a mentorship program in your organization?
- What is the scope of the program? (Are you looking for a full long-term matching design or creating one-time mentorship experiences? If so, review the mentor/mentee application templates for guidance.)
- How does this program fit within your mission, vision, and strategic goals?
- Who is the main audience for this program? Mentor, mentee or both?

DIVERSITY AND INCLUSION CONSIDERATIONS

- How do you create a program that is inclusive for members of underrepresented populations (i.e. racial and sexual minorities, disabilities etc.)?
- Will the program include cross-cultural and/or cross-gender mentoring?

ANALYSIS OF COST/STAFFING AND IMPACT

- What are the parameters, risks, and dependencies associated with this program?
- What type of time/capacity will be needed to operate this program?
- What is the projected cost to develop this type of programming?
- How will you know if the program is making an impact? How are you defining impact/success?

PROJECT AND GOAL

MENTORSHIP PROGRAM PROJECT PLAN

IMPLEMENTATION

A RACIS matrix is a table used to show roles and responsibilities in a process.

The acronym RACIS stands for:

R - Responsible for the step

A - Accountable for the step

C - Consulted with before the step

I - Informed when the step is completed

S - Support helps Responsible complete the step

| Example of RACIS matrix | Jack | Jill | Jane | Joe | John |
|---|------|------|------|-----|------|
| Phase 1 Research/Need Assessment/Design | R | S | C | I | A |
| Phase 2 Program Implementation | R | S | C | I | A |
| Phase 3 Evaluation | S | S | R | A | I |

RACIS matrix

| Phase | Description | | | | | |
|-------|---------------------------------|----------------------------------|--|--|--|--|
| | | Add names and assign RACIS roles | | | | |
| 1 | Research/Need Assessment/Design | | | | | |
| 2 | Program Implementation | | | | | |
| 3 | Evaluation | | | | | |

Phase 1 Research/Need Assessment/Design

| COMPLETED | TASK | PERSON | START | DUE | NOTES |
|-----------|-------------------------------------|--------|-------|-----|-------|
| | Research other similar programs | | | | |
| | Survey member needs | | | | |
| | Stakeholder Feedback | | | | |
| | Develop Marketing/Branding Campaign | | | | |
| | Design Evaluation Plan | | | | |

Phase 2 Program Implementation

| COMPLETED | TASK | PERSON | START | DUE | NOTES |
|-----------|-------------------------------|--------|-------|-----|-------|
| | Create Volunteer Descriptions | | | | |
| | Design Website | | | | |
| | Recruit Mentors | | | | |
| | Recruit Mentees | | | | |
| | Hold Orientation | | | | |
| | Workshop | | | | |
| | CLE | | | | |
| | Networking Event | | | | |

Phase 3 Evaluation

| COMPLETED | TASK | PERSON | START | DUE | NOTES |
|-----------|-------------------|--------|-------|-----|-------|
| | Create Survey | | | | |
| | Administer Survey | | | | |
| | Data Analysis | | | | |
| | Report out | | | | |

MENTOR APPLICATION

CONTACT INFORMATION

| | |
|---|---|
| <p>Name _____</p> <p>Employer _____</p> | <p>License Number _____</p> <p>*Email _____</p> |
|---|---|

*Email will be the primary means of contact

MENTOR ACKNOWLEDGMENT

- ☐ I am an active Washington State Bar Association member and in good standing for five or more years.
 - ☐ I understand that no client information may be discussed with my Mentee in accordance with RPC 1.6.
 - ☐ I understand that if I am matched with someone in my firm, I must notify the organization immediately.
- A mentor cannot be employed by the same employer (firm, organization etc.) as the mentee, if the mentor is going to claim MCLE credit.
- ☐ I will not co-counsel with my Mentee.
 - ☐ I understand that I can claim only “other” or “ethics” credits.
 - ☐ I agree to attend an orientation specific to this program.
 - ☐ I agree to dedicate the time necessary to the mentoring relationship. If for any reason, I cannot continue my mentoring relationship, I will notify the organization right away.

ABOUT YOU

| | |
|---------------------------------------|-------|
| Undergraduate School | _____ |
| Major | _____ |
| Law School | _____ |
| Year of Graduation | _____ |
| Year Admitted to WSBA | _____ |
| Practice Area(s) | _____ |
| Other Legal Jurisdictions | _____ |
| Other Professional Organizations | _____ |
| WSBA or other professional activities | _____ |
| Volunteer Activities | _____ |
| Hobbies and Interests | _____ |

Why do you seek a Mentee?

MENTOR APPLICATION

Check any or all of the following skills/areas you would like to mentor in:

- ☐ Practice area –specific issues (based on the practice areas I listed previously)
- ☐ Law Office Management (may include technology)
- ☐ Court Appearance
- ☐ Research
- ☐ Substance abuse/mental health issues
- ☐ Resource for assessing career paths
- ☐ Resource for work-life balance
- ☐ Other:

Type of Practice:

- ☐ Of Counsel
- ☐ Emeritus Pro Bono
- ☐ Law Firm
- ☐ Government Office
- ☐ In-House corporate counsel
- ☐ Non-legal job
- ☐ Nonprofit Organization
- ☐ Solo
- ☐ Do not currently practice
- ☐ Other:

Size of Firm:

- ☐ 1 lawyer
- ☐ 2-9 lawyers
- ☐ 10-39 lawyers
- ☐ 40+ lawyers
- ☐ Do not currently practice

Location of Practice:

- ☐ Large urban area
- ☐ Medium-sized city
- ☐ Small city/rural area
- ☐ Do not currently practice

Additional relevant information:

BEING MATCHED

- ☐ Please match me with a mentee as needed
- ☐ Please match me to:

Name of Mentee

Mentee's Bar Number (if Known)

MENTEE APPLICATION

CONTACT INFORMATION

Name _____ License Number _____
 Employer _____ *Email _____
*Email will be the primary means of contact

MENTEE ACKNOWLEDGMENT

- ☐ I am an active Washington State Bar Association member and in good standing for five or more years.
- ☐ I understand that no client information may be discussed with my Mentor in accordance with RPC 1.6.
- ☐ I understand that if I am matched with someone in my firm, I must notify the organization immediately.
- ☐ I will not co-counsel with my Mentee.
- ☐ I understand that I can claim only “other” or “ethics” credits.
- ☐ I agree to attend an orientation specific to this program.
- ☐ I agree to dedicate the time necessary to the mentoring relationship. If for any reason, I cannot continue my mentoring relationship, I will notify the organization right away.

ABOUT YOU

Undergraduate School _____
 Major _____
 Law School _____
 Year of Graduation _____
 Year Admitted to WSBA _____
 Practice Area(s) _____
 Other Legal Jurisdictions _____
 Other Professional Organizations _____
 WSBA or other professional activities _____
 Volunteer Activities _____
 Hobbies and Interests _____

Why do you seek a Mentor?

MENTEE APPLICATION

Check any or all of the following skills/areas you would like to mentor in:

- ☐ Practice area –specific issues (based on the practice areas I listed previously)
- ☐ Law Office Management (may include technology)
- ☐ Court Appearance
- ☐ Research
- ☐ Substance abuse/mental health issues
- ☐ Resource for assessing career paths
- ☐ Resource for work-life balance
- ☐ Other:

Type of Practice:

- ☐ Of Counsel
- ☐ Emeritus Pro Bono
- ☐ Law Firm
- ☐ Government Office
- ☐ In-House corporate counsel
- ☐ Non-legal job
- ☐ Nonprofit Organization
- ☐ Solo
- ☐ Do not currently practice
- ☐ Other:

Size of Firm:

- ☐ 1 lawyer
- ☐ 2-9 lawyers
- ☐ 10-39 lawyers
- ☐ 40+ lawyers
- ☐ Do not currently practice

Location of Practice:

- ☐ Large urban area
- ☐ Medium-sized city
- ☐ Small city/rural area
- ☐ Do not currently practice

Additional relevant information:

BEING MATCHED

- ☐ Please match me with a mentor as needed
- ☐ Please match me to:

Name of Mentor

Mentor's Bar Number (if Known)

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

The Mentoring Plan defines the learning curriculum to be carried out during the mentoring relationship. The 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.

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: | |

MENTORING PLAN

C) PROFESSIONAL

| 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 practice development and marketing, client relations, employee relations and responsibilities when opening or closing an office. | |
| | Other: | |
| | Other: | |

MENTORING PLAN

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 pro bono 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.

WSBA MCLE Requirements Checklist

For organizations with mentorship programs seeking MCLE accreditation, follow these instructions and send application and materials to mcle@wsba.org. It is your responsibility to inform MCLE of any changes in your program or if the program is terminated.

Overview of MCLE requirements:

Organization's Application Requirements:

- ☐ Application Form
- ☐ Description of the Program
- ☐ Mentoring Agreement
- ☐ Mentoring Plan
- ☐ Evaluation Form

Please note: Send the application & materials to mcle@wsba.org. It is your responsibility to inform MCLE (mcle@wsba.org) of any changes in your program or if the program is terminated. All structured mentoring program applications will be reviewed by the MCLE Board at the next scheduled MCLE Board meeting following application submission.

Mentor/Mentee Eligibility

- ☐ Active members of the WSBA
- ☐ Match must not work for the same employer
- ☐ Mentor must be a WSBA member in good standing for at least 5 years. Mentors cannot charge or be paid.

Mentors and Mentees Responsibilities:

- ☐ Attend an orientation meeting (not available for CLE credit)
- ☐ Sign a mentoring agreement
- ☐ Create a personalized mentoring plan
- ☐ Have face-to-face mentoring meetings (in person or electronic, i.e., Skype)
- ☐ Provide an evaluation to the Organization
- ☐ Report MCLE Credits (see page 9 of the included MCLE Portal Member Guide)

MCLE Credit Information (APR 11)

- ☐ Credits are earned at the rate of one credit per each 60 minutes of mentoring.
- ☐ Credits can only be applied as "Other" or "Ethics" credits.
- ☐ Approved [Structured Mentoring Program](#) or the [Self-Directed Structured Mentoring Program](#) must be followed.

A Sample Orientation and Training Agenda

1. Share The Following Information (15 Minutes):

- Organization's goals, mission, vision (as an organization and of mentoring program).
- How were mentors/mentees paired?
- How does the program work? What are the policies of your particular program?
- How does the pair receive credit?
- Organization's resources and other outside programs.

2. Discuss (15 Minutes):

- The fear of difference and finding common ground.
- Cultural, i.e. able-bodiedness, geographic location, etc.—and gender-based assumptions.
- How to openly discuss differences for mutual learning.
- Managing and recovering from **micro-inequities** (mentors and mentees).

3. Allow the matched pairing time to work on the Mentoring Plan and sign the Mentoring Agreement. (45 minutes)

Micro-inequities are messages of prejudice that are often unconscious and subtle. These messages can be verbal or non-verbal.

Three Steps to Deepening the Dialogue and Building Healthy Relationships

Gender binary is the classification of all people into one of two distinct and separate forms of masculine and feminine. The binary model is viewed as rigid and is grounded in a person's physical anatomy.

Implicit Bias includes the unconscious associations, assumptions, and feelings we have about certain groups that results in differential treatment.

1. Finding common ground: We refer to common ground as the space two or more individuals are able to occupy through a shared experience. This is where we build on our similarities. For instance, both the mentee and mentor may discover they are both parents. This is a great opportunity to discuss the joys and challenges of parenting while actively practicing law. Each time similarities are discovered, the common ground shared expands its space to include both participants. As this space expands, the relationship organically strengthens and the connection deepens. This provides fertile ground for continued mutual learning and a more sustainable relationship.

2. Overcoming the fear of difference: Often, individuals are afraid of cross-cultural conversations because they worry about making a social faux pas. Engaging in self-evaluation and self-critique often can help identify the source of some of that fear.

Knowledge: What do I understand about the social identity groups or communities my mentor/mentee is part of? Where did I learn that? How do I know it to be true?

Attitudes: What judgments and attitudes do I have about my mentor/mentee based on their social and personal identities?

Behavior: What would happen to this mentor relationship if I acted upon my beliefs and attitudes?

Setting aside space to co-creating goals and expectations for the mentor/mentee relationship can help reduce that fear.

Potential topics to discuss:

- a. Implicit bias (we all have them regardless of race, economic status, gender, etc.)
- b. Systemic oppression
- c. Cultural competence
- d. Micro-inequities
- e. Conflict resolution through in-person dialogue

Three Steps to Deepening the Dialogue and Building Healthy Relationships

3. Mutual learning through differences: One helpful tool to ensure mutual respect and common ground when rifts in conversation appear is the L.A.R.A. Method. This acronym stands for Listen, Affirm, Respond, and Ask/Add, and can be repeated many times to restore common ground.

Listen: Practice listening to understand; take special care to listen to the speaker's feelings.

Affirm: Identify and affirm a feeling or value shared with the speaker. Some helpful phrases are "I'm hearing you say.... We both seem to agree that...." "It sounds like you are feeling.... It seems like we both care a lot about..."

Respond: Taking another person's concerns seriously are crucial to maintaining respect across difference. Reply directly to any questions or concerns shared by the speaker.

Ask or Add: Asking open-ended questions can further bridge divides by demonstrating interest and investment into understanding a person's point of view. Adding personal stories or opinions should only be done once the speaker feels understood and affirmed.

Additional subjects that could be taken into account:

- a. Professional experience
- b. Cultural background
- c. Generation
- d. Racial stereotypes
- e. Gender perceptions
- f. Disability/impairment
- g. Economic status



Evaluation Checklist

You can evaluate at any time to ensure your goals are being met and to change aspects of the program to further its success. The type of evaluation you design determines how often you will analyze your program. Best practices suggest that when piloting a program, administering an annual evaluation allows for course correction early enough to improve the success of your program. A good evaluation has four key elements and most of it is defined during program design. This allows you to know what impact your program has on your matches.

1. **Focus:** What type of evaluation are you trying to conduct? The most common types of questions asked fall under one of the categories below. You determine if you want to design evaluations that address all four categories or if you want to focus on just a few.
 - ☐ Program theory: Questions about program conceptualization and design.
 - ☐ Program process: Questions about program operations, implementation, and service delivery.
 - ☐ Impact: Questions about program outcomes and impact.
 - ☐ Efficiency: Questions about program cost and cost-effectiveness.
2. **Design & Collect Data:** An evaluation design must identify the methods that will be used to answer each of the questions identified.
 - ☐ Will it mainly be a qualitative or quantitative design, or mixed methods?
 - ☐ How will you develop the right questions? Coming up with questions to ask is an art form, take time to consider what information you are trying to pull from your participants.
 - ☐ Will you need to use surveys, questionnaires, snowball sampling, focus groups, or one-on-one interviews?
 - ☐ Who will be doing the evaluations?
 - ☐ When should you be conducting these?
3. **Analyze & Interpret:** Now that you have the data, you need to analyze and interpret it. Who will do this? Best practice is to have multiple people working on understanding the data. Some questions to help you think through this are:
 - ☐ Will you hire a consultant?
 - ☐ If not, who will be your team to analyze that data?
 - ☐ Should it include volunteers, staff, and/or other stakeholders?
4. **Report:** You have conducted the survey, collected and interpreted the data. What's next? Reporting results to your stakeholders, whether positive or negative, is often a missed step and opportunity. Informing your stakeholders indicates that you are willing to be transparent and accountable for the program.

MENTORING EVALUATION

Available as a 2-page WORD.DOC download at:
www.wsba.org/docs/default-source/resources-services/mentorship/mentorship-curriculum/mentoring-evaluation.docx?sfvrsn=7b1d00f1_11

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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☐ Mentor

☐ Mentee

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MENTOR EVALUATION

Available as a 2-page WORD.DOC download at:

www.wsba.org/docs/default-source/resources-services/mentorship/mentorship-curriculum/mentor-evaluation-v120cd65f2f6d9654cb471ff1f00003f4f.docx?sfvrsn=2e1d00f1_13

Name: _____ License #: _____ Date: _____

ABOUT YOU

1. How did you find out about the Program?

2. What made you want to sign-up for the Program?

3. How long have you been practicing (in any jurisdiction)?

- ☐ 0-5 years
☐ 6-10 years
☐ 11-15 years
☐ 16-20 years
☐ 21-30 years
☐ 31+ years, please specify _____

4. Have you participated in another mentorship program as a mentor before?

- ☐ Yes
☐ No

5. How did this experience compare?

- ☐ Better
☐ Same
☐ Worse

Comments:

ABOUT THE PROGRAM

6. Was the orientation helpful in beginning your mentoring relationship?

- ☐ Yes
☐ No

7. What can this Program do to help to make your match more successful?

8. How would you describe the quality of your experience as a participant in the program?

9. Were the mentor program coordinators accessible, easy to talk to and seek advice from when necessary?

- ☐ Yes
☐ No

MENTOR EVALUATION

ABOUT THE MATCH

10. How would you describe your relationship with your mentee?

11. Did you gain personally from this relationship?

- ☐ Yes
☐ No

12. Did you feel adequately prepared to mentor?

- ☐ Yes
☐ No

13. How did you meet?

- ☐ Video Conferencing (Skype etc.)
☐ In-person
☐ Email
☐ Phone
☐ Other, please specify _____

14. Did you follow the original Mentoring Agreement? If not, please explain why.

- ☐ Yes
☐ No

15. How often did you meet?

- ☐ Once a month
☐ Every two months
☐ Every two weeks
☐ When necessary
☐ Other, please specify _____

16. Are/were there any factors that made it difficult to participate?

- ☐ Yes
☐ No

a. If so what are/were those factors?

b. How did you overcome those factors?

17. Did you plan on maintaining a relationship with your mentee?

- ☐ Yes
☐ No

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

MENTEE EVALUATION

Available as a 2-page WORD.DOC download at:

www.wsba.org/docs/default-source/resources-services/mentorship/mentorship-curriculum/mentee-evaluation-v130cd65f2f6d9654cb471ff1f00003f4f.docx?sfvrsn=3f1d00f1_11

Name: _____ License #: _____ Date: _____

ABOUT YOU

1. How did you find out about the Program?

2. What made you want to sign-up for the Program?

3. How long have you been practicing (in any jurisdiction)?

- ☐ 0-5 years
☐ 6-10 years
☐ 11-15 years
☐ 16-20 years
☐ 21-30 years
☐ 31+ years, please specify _____

4. Have you participated in another mentorship program as a mentor before?

- ☐ Yes
☐ No

5. How did this experience compare?

- ☐ Better
☐ Same
☐ Worse

Comments:

ABOUT THE PROGRAM

6. Was the orientation helpful in beginning your mentoring relationship?

- ☐ Yes
☐ No

7. What can this Program do to help to make your match more successful?

8. How would you describe the quality of your experience as a participant in the program?

9. Were the mentor program coordinators accessible, easy to talk to and seek advice from when necessary?

- ☐ Yes
☐ No

MENTEE EVALUATION

ABOUT THE MATCH

10. How would you describe your relationship with your mentor?

11. Did you gain personally from this relationship?

- ☐ Yes
☐ No

12. Do you feel your mentor was adequately prepared to be one?

- ☐ Yes
☐ No

13. How did you meet?

- ☐ Video Conferencing (Skype etc.)
☐ In-person
☐ Email
☐ Phone
☐ Other, please specify _____

14. Did you follow the original Mentoring Agreement? If not, please explain why.

- ☐ Yes
☐ No

15. How often did you meet?

- ☐ Once a month
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16. Are/were there any factors that made it difficult to participate?

- ☐ Yes
☐ No

a. If so what are/were those factors?

b. How did you overcome those factors?

17. Did you plan on maintaining a relationship with your mentor?

- ☐ Yes
☐ No

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

AM I READY TO BE A MENTOR?

CONSIDER...

- Do I have the actual time to commit to my mentee? How much time?
- Am I willing to share my challenges, as well as my successes?
- What do I hope to gain from this experience? What do I hope to teach?
- What aspect(s) of my career path puts me in a unique position to mentor?

HOW CAN I BE A GOOD *MENTOR?*

- Come on time to appointments; respond within 48 hours to emails.
- Show personal interest in your mentee.
- Give positive and constructive feedback.
- Create a welcoming & inclusive environment.
- Consider barriers mentee faces in their career, and provide advice and support accordingly.

HOW CAN I BE A GREAT *MENTOR?*

- Come early to appointments; respond within 24 hours to emails.
- Read about the mentee's interests prior to your next meeting.
- Ask for feedback on being a mentor.
- Initiate dialogue regarding barriers and facilitators to creating an inclusive and supportive environment.
- Ask the mentee what kind of proactive support he/she needs to overcome barriers.

HOW DO I FIND A MENTEE?

The WSBA MentorLink webpage

<https://www.wsba.org/connect-serve/mentorship/be-a-mentor>

is a great source of information on how to be matched.

Please contact us at mentorlink@wsba.org or **800-945-9722**.

WASHINGTON STATE
BAR ASSOCIATION

QUICK TIPS

FOR SEEKING MENTORS AND ADVISORS

MAKE A PLAN

Before you start researching or contacting potential mentors and advisors, assess your goals and most critical needs. Ask yourself:

1. What are my three most pressing questions or concerns? For example:
 - *Communicating with clients and opposing counsel?*
 - *Managing a solo practice?*
 - *Understanding court rules & procedures?*
 - *Questions about a specific area of law?*
2. What would be most helpful to discuss with a more experienced attorney vs. doing research to find some answers?
3. What am I going to ask for? For example:
 - *Ongoing email contact?*
 - *Coffee date(s)?*
 - *Skype phone call to bridge the miles?*
 - *One day of shadowing at office or court?*
4. Is my resume and short bio updated and ready to send?

FIND A MENTOR

Once you have a clear idea of your goals, you can take the next step to researching potential mentors based on such criteria such as: geography, practice setting and area of law. In addition to reviewing the [WSBA Legal Directory](#) for updated information, strategies for locating potential mentors and advisors might include:

- Asking around! Someone in your current network might know someone and be able to make an introduction.
- Attending events put on by sections, minority bar associations, local bar associations, specialty bar associations, and/or law school alumni programs.
- Reviewing legal publications for article authors or references to specific individuals in your practice area.
- Attend a [MentorLink Mixer](#).
- Sign up and create a profile on [ALPS Attorney Match](#).

TAKE ACTION

Many potential mentors and advisors are happy to help, and just need to be asked! However, it's important that the mentee take the lead in reaching out and following-up, while being respectful of the mentor's time and schedule. Strategies might include:

- *Sending an initial letter or email:* who you are, what you want, why you're asking them, and how soon you're hoping to meet.
- *During meeting:* be specific on how they can help and find out what works for them.
- Clarify expectations about ongoing contact.
- Send thank you notes and stay in touch!

IMPORTANT GUIDELINES TO REMEMBER

Mentoring sessions may involve only generalized questions that do not involve the disclosure of details from a specific case or client. A mentor-mentee relationship does not create an attorney client relationship, and the discussions are not privileged or confidential. In other words, assume your conversations are completely public.

Consistent with R.P.C. 1.6, the mentee will not identify any client to the mentor or reveal to the mentor any information related to the representation of the client, nor will the mentee seek professional or legal advice from the mentor about specific legal matters or clients such that protected communications are revealed. Subject to the limits of the previous paragraph and pursuant to R.P.C. 1.6 (b)(4), a lawyer may reveal information relating to the representation of a client to the extent the lawyer reasonably believes necessary to secure legal advice about the lawyer's compliance with the Rules of Professional Conduct. Discussions, if any, about substantive legal matters between the mentee and mentor will be limited to hypothetical situations.

ADDITIONAL RESOURCES:

- **WSBA Mentorship Resources**
Information on mentoring opportunities that currently exist across our state's legal community, in addition to other mentoring resources to support WSBA members at www.wsba.org/connect-serve/mentorship
- **WSBA Ethics Line: 206-727-8284**
Informal guidance as to an attorney's own prospective ethical conduct. Common ethical issues are: conflicts of interest, client communication, handling client money, fee arrangements, confidential information, and how to withdraw from a matter in an ethical manner. For more ethics-related resources visit the WSBA website at www.wsba.org/for-legal-professionals/ethics
- **WSBA Practice Management Assistance Program**
Low-cost and confidential professional assistance with office administration, as well as print and web resources to assist with opening, closing, and managing your practice. For more practice management resources visit the WSBA website at www.wsba.org/for-legal-professionals/member-support/practice-management-assistance
- **Questions?**
mentorlink@wsba.org | 1-800-945-9722

