

**MODEL MENTORING PLAN: FORM TO CREATE THE PERSONAL MENTORING PLAN**

Print or Type	Name	LSBA Bar #
Mentee:		
Mentor:		

This form (consisting of 7 pages) is to be used by the Mentee and Mentor to prepare and customize the New Lawyer’s Personal Mentoring Plan.

A Personal Mentoring Plan Must Include:

- **ELEVEN (11) REQUIRED ANNUAL ACTIVITIES AND EXPERIENCES**, which may be completed at any point throughout the TIP period; AND
- **AT LEAST FIVE (5) DISCUSSION ACTIVITIES** from each Section. Please note that any Section Activities designated as “Required” must be included as part of the 5 activities selected for that Section.

**REQUIRED ANNUAL ACTIVITIES**

(Must complete all 11 activities)

ACTIVITY/EXPERIENCE - ALL TO BE COMPLETED DURING THE TIP PERIOD			MENTEE: INITIAL & DATE WHEN COMPLETED
1	Attend Civil Hearing or Trial in State District Court	<b>Required</b>	
2	Attend Criminal Hearing or Trial in State District Court	<b>Required</b>	
3	Attend Civil Hearing or Trial in Federal District Court	<b>Required</b>	
4	Attend Criminal Hearing or Trial in Federal District Court	<b>Required</b>	
5	View Appellate Court Oral Argument (may view on-line Louisiana Supreme Court oral argument)	<b>Required</b>	
6	Attend Hearing or Trial in at Least Two (2) Different Specialized Courts [ <b>1<sup>st</sup> Court</b> ]: [circle court selected] - Bankruptcy Court - State or Federal Administrative Law Court - Family/Domestic/Juvenile Court - Small Claims Court	<b>Required</b>	
7	Attend Hearing or Trial in at Least Two (2) Different Specialized Courts [ <b>2<sup>nd</sup> Court</b> ]: [circle court selected] - Bankruptcy Court - State or Federal Administrative Law Court - Family/Domestic/Juvenile Court - Small Claims Court	<b>Required</b>	
8	Attend Deposition (with Mentor)	<b>Required</b>	
9	Visit Jail (with Mentor) – to understand procedure(s) for visiting clients in jail [ <a href="#">Worksheet 9</a> ]	<b>Required</b>	
10	Attend at least one (1) Meeting or Function of LSBA, local bar association, specialized bar association, or Inn of Court (with Mentor) [ <a href="#">Worksheet 10</a> ]	<b>Required</b>	
11	Attend LSBA’s Bridging the Gap Program	<b>Required</b>	

## FIRST SECTION: SERVING THE PUBLIC AND SERVING THE PROFESSION

(SELECT AT LEAST FIVE (5) THIS SECTION)

DISCUSSION ACTIVITY		MENTEE: <u>CIRCLE</u> EACH ITEM TO BE COMPLETED	MENTEE: INITIAL & DATE WHEN COMPLETED
1	Mentee - During First Month, Contact Mentor & Arrange to Meet at the Mentor's Office to Get Acquainted (i.e., Initial Meeting) [ <a href="#">Worksheet 1-2</a> ]	<b>Required</b>	
2	Mentee & Mentor - <u>During Initial Meeting</u> at Mentor's Office, Develop Mentee's Personal Mentoring Plan [ <a href="#">Worksheet 1-2</a> ]	<b>Required</b>	
3	Mentee & Mentor – <u>During Initial Meeting</u> at Mentor's Office, Discuss Louisiana Code of Professionalism [ <a href="#">Worksheet 3</a> ]	<b>Required</b>	
4	Mentee & Mentor - Discuss "Unwritten" Customary Rules of Civility & Etiquette Among Lawyers & Judges [ <a href="#">Worksheet 4</a> ]	Option	
5	Mentee & Mentor - Meet at Mentor's Office to be Introduced to Other Members of Mentor's Law Firm [ <a href="#">Worksheet 5</a> ]	Option	
6	Mentee & Mentor – Review & Discuss Rule 6.2 & Rule 6.3 of the Louisiana Rules of Professional Conduct ("LRPC") [ <a href="#">Worksheet 6</a> ]	Option	
7	Mentor – Acquaint Mentee with "Legal Aid", Local Pro Bono Agencies & Lawyers Engaging in Civic and/or Charitable Work [ <a href="#">Worksheet 7</a> ]	Option	
8	Mentee & Mentor – Discuss Work/Life Balance and Factors Affecting Ability to Practice Successfully [ <a href="#">Worksheet 8</a> ]	Option	
9	Mentee & Mentor – Discuss Annual MCLE Requirements & Ways to Fulfill Same [ <a href="#">Worksheet 9</a> ]	Option	

**SECOND SECTION: PERSONAL, PROFESSIONAL AND ETHICAL DEVELOPMENT**

(SELECT AT LEAST FIVE (5) THIS SECTION)

DISCUSSION ACTIVITY		MENTEE: <u>CIRCLE</u> EACH ITEM TO BE COMPLETED	MENTEE: INITIAL & DATE WHEN COMPLETED
1	Mentee & Mentor - Discuss New Lawyer’s Long-Term Career Objectives & Identify Ways to Meet These Goals [ <a href="#">Worksheet 1</a> ]	Option	
2	Mentee & Mentor – Discuss Lawyer-Related Substance Abuse & Mental Health Issues: Warning Signs; Colleagues With Problems; Resources (LSBA Lawyers Assistance Program (“LAP”)) [ <a href="#">Worksheet 2</a> ]	<b>Required</b>	
3	Mentee & Mentor – Discuss Career Paths & Identify Resources for Exploring Options, Including Discussing Differences in Working in Firms of Various Sizes & in Government [ <a href="#">Worksheet 3</a> ]	Option	
4	Mentee & Mentor - Discuss Managing Law School Debt [ <a href="#">Worksheet 4</a> ]	Option	
5	Mentee & Mentor – Discuss Job Search Strategies [ <a href="#">Worksheet 5</a> ]	Option	
6	Mentee & Mentor – Discuss Common Malpractice Traps & How To Avoid Them [ <a href="#">Worksheet 6</a> ]	Option	
7	Mentee & Mentor – Discuss Handling Conflicts of Interest Issues; Review Rules 1.7, 1.8, 1.9, 1.10, 1.11, 1.12, 1.13 & 1.14 of the “LRPC” [ <a href="#">Worksheet 7</a> ]	Option	
8	Mentee & Mentor – Discuss Purpose(s), Importance & Benefits of Prof. Liability Insurance [ <a href="#">Worksheet 8</a> ]	Option	
9	Mentee & Mentor – Discuss LA Attorney Disciplinary Process, including Operation & Function(s) of Office of Disciplinary Counsel, and Duty to Cooperate in Disciplinary Matters (Rule 8.1 of the “LRPC”) [ <a href="#">Worksheet 9</a> ]	Option	
10	Mentee & Mentor – Discuss Handling Ethics Issues at Law Firm: Issues with Associate(s); Issues with Partner(s); Issues with Other Lawyers; discuss LSBA Ethics Advisory Service [ <a href="#">Worksheet 10</a> ]	Option	

### **THIRD SECTION: CLIENT RELATIONS, COMMUNICATION AND NEGOTIATIONS**

(SELECT AT LEAST FIVE (5) THIS SECTION)

DISCUSSION ACTIVITY		MENTEE: <u>CIRCLE</u> EACH ITEM TO BE COMPLETED	MENTEE: INITIAL & DATE WHEN COMPLETED
1	Mentee & Mentor - Discuss Client & Business Development, Retention of Clients & Related Ethics Issues [ <a href="#">Worksheet 1</a> ]	Option	
2	Mentee & Mentor – Discuss Client Role in Decision-Making Process (incl. Rule 1.2 of the “LRPC”) [ <a href="#">Worksheet 2</a> ]	Option	
3	Mentee & Mentor – Discuss How to Evaluate a Potential New Case & Whether to Accept a New Case [ <a href="#">Worksheet 3</a> ]	Option	
4	Mentee & Mentor - Discuss Dealing with “Difficult” Client(s) [ <a href="#">Worksheet 4</a> ]	Option	
5	Mentee & Mentor – Discuss Importance of Good Communication with Client, Providing Updates, Status Reports, Etc. (incl. Rule 1.4 of the “LRPC”) [ <a href="#">Worksheet 5</a> ]	Option	
6	Mentee & Mentor – Discuss Setting Fees, Fee Arrangements & Fee Agreements [ <a href="#">Worksheet 6</a> ]	Option	
7	Mentee & Mentor – Discuss Techniques for Legal Counseling & Advising Clients [ <a href="#">Worksheet 7</a> ]	Option	
8	Mentee & Mentor – Discuss Appropriate Ways for Dealing With Others on Behalf of Clients (incl. ethics, professionalism, custom, etiquette, etc.) [ <a href="#">Worksheet 8</a> ]	Option	
9	Mentee & Mentor – Discuss Preparation for Taking & Defending Depositions [ <a href="#">Worksheet 9</a> ]	Option	
10	Mentee & Mentor – Discuss Methods & Issues in Negotiations [ <a href="#">Worksheet 10</a> ]	Option	
11	Mentee & Mentor – Discuss Effective Legal Writing [ <a href="#">Worksheet 11</a> ]	Option	
12	Mentee & Mentor – Discuss Alternative Dispute Resolution (“ADR”) [ <a href="#">Worksheet 12</a> ]	Option	

## FOURTH SECTION: LAW OFFICE MANAGEMENT

(SELECT AT LEAST FIVE (5) THIS SECTION)

DISCUSSION ACTIVITY		MENTEE: <u>CIRCLE</u> EACH ITEM TO BE COMPLETED	MENTEE: INITIAL & DATE WHEN COMPLETED
1	Mentee & Mentor - Discuss Lawyer-Client Confidentiality (Rule 1.6 of the "LRPC") vs. Attorney-Client Privilege [ <a href="#">Worksheet 1</a> ]	Option	
2	Mentee & Mentor – Discuss Checking for/ Recognize Conflicts of Interest [ <a href="#">Worksheet 2</a> ]	Option	
3	Mentee & Mentor – Discuss Roles of Secretaries, Legal Assistants, Paralegals, Law Clerks, etc. (Rule 5.3 of the "LRPC") [ <a href="#">Worksheet 3</a> ]	Option	
4	Mentee & Mentor - Discuss Unauthorized Practice of Law & Prevention of Same (R.S. 37: 213 & Rule 5.5 of the "LRPC") [ <a href="#">Worksheet 4</a> ]	Option	
5	Mentee & Mentor – Discuss "Office Politics", Including What is & What is not Appropriate Networking, Socializing & Personal Behavior(s) [ <a href="#">Worksheet 5</a> ]	Option	
6	Mentee & Mentor – Discuss Issues & Steps for Leaving a Law Firm [ <a href="#">Worksheet 6</a> ]	Option	
7	Mentee & Mentor – Discuss Good Time Management Skills/Techniques [ <a href="#">Worksheet 7</a> ]	Option	
8	Mentee & Mentor – Discuss Law Office Management Matters, such as: [ <a href="#">Worksheet 8</a> ] <ul style="list-style-type: none"> <li>- Time Records</li> <li>- Records of Client Expenses</li> <li>- Billing Systems</li> <li>- Advance Deposits/Payment Schedules</li> <li>- Trust Accounting, incl. IOLTA &amp; Handling Client Funds</li> <li>- Filing System(s) &amp; Procedures</li> <li>- Document/File Retention</li> <li>- Calendar Reminder, Docket &amp; Case Management Systems</li> <li>- Information Technology Systems, incl. On-line Court Systems such as PACER</li> <li>- Library &amp; Legal Research System(s)</li> </ul>	Option	



*Special thanks to  
Gilsbar for its  
generosity in  
sponsoring the  
LSBA Mentoring  
Program*



**MENTORING PLAN ACKNOWLEDGEMENT**

The undersigned Mentee and Mentor have reviewed the foregoing Personal Mentoring Plan together, thoughtfully discussing and considering both the Required Annual Activities and the choice of Section Activities in order to formulate the Mentee’s Personal Mentoring Plan.

We hereby pledge and agree that we will devote the time, effort, and patience necessary to carry out and complete the Mentee’s Personal Mentoring Plan during the applicable TIP period.

The Mentee and the Mentor understand that this program is one of mentoring. There is no expectation of future employment with the Mentor’s firm or business.

The Mentee will engage in the highest level of ethics and professionalism while dealing with the Mentor. All information discussed and writings reviewed while engaging in the Mentoring process, particularly at the Mentor’s office, will be held in the highest and strictest of confidence.

To the extent compliance is not made with the terms and conditions of this program, the Mentee and/or the Mentor shall contact the Louisiana State Bar Association at (504) 566-1600 to discuss these concerns. The LSBA must be notified as soon as such issues arise to ensure full compliance with this program.

This Acknowledgement is to be signed by both parties and returned to the LSBA by email to: TIP@lsba.org.

\_\_\_\_\_  
Printed Name of Mentee

\_\_\_\_\_  
Signature of Mentee

\_\_\_\_\_  
Printed Name of Mentor

\_\_\_\_\_  
Signature of Mentor

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date