



# LAWYER TO LAWYER

MENTORING PROGRAM

## Mentee Orientation Guide



*Increasing the value, virtue, and voice of professionalism.*





# Lawyer to Lawyer

## Mentee Orientation Guide

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Sharon L. Kennedy

CHIEF JUSTICE

Patrick F. Fischer

R. Patrick DeWine

Jennifer Brunner

Joseph T. Deters

Daniel R. Hawkins

Megan E. Shanahan

JUSTICES

Robert W. Horner, III

ADMINISTRATIVE DIRECTOR

---

# Office of Attorney Services

**Michel Jendretzky**

DIRECTOR OF ATTORNEY SERVICES

**MacLaren Roemer**

SECRETARY, COMMISSION ON PROFESSIONALISM

614.387.9343 • [LAWYER2LAWYER@SC.OHIO.GOV](mailto:LAWYER2LAWYER@SC.OHIO.GOV)

## **THE SUPREME COURT OF OHIO COMMISSION ON PROFESSIONALISM**

The Supreme Court of Ohio created the Commission on Professionalism in September 1992. As stated in Gov.Bar R. XV, the commission's purpose is to promote professionalism among attorneys admitted to the practice of law in Ohio. The commission aspires to advance the highest standards of integrity and honor among members of the profession.

The 15-member commission includes five judges and two lay members appointed by the Supreme Court, six attorneys appointed by the Ohio Metropolitan Bar Association Consortium and Ohio State Bar Association, and two law school administrators or faculty. The duties of the commission include:

- Monitoring and coordinating professionalism efforts and activities in Ohio courts, bar associations and law schools, and in jurisdictions outside Ohio
- Promoting and sponsoring state and local activities that emphasize and enhance professionalism
- Developing educational materials and other information for use by judicial organizations, bar associations, law schools and other entities
- Assisting in the development of law school orientation programs and curricula, new lawyer training and continuing education programs
- Making recommendations to the Supreme Court, judicial organizations, bar associations, law schools and other entities on methods for enhancing professionalism
- Overseeing and administering a mentoring program for attorneys newly admitted to the practice of law in Ohio.

**Visit [www.supremecourt.ohio.gov](http://www.supremecourt.ohio.gov) for more information.**



**LAWYER TO LAWYER MENTORING PROGRAM**  
**Mentee Orientation**

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## Lawyer to Lawyer

# I. Program Overview

## LAWYER TO LAWYER MENTORING PROGRAM OVERVIEW

### A. Starting at the Beginning

#### 1. The Program Objective

The Lawyer to Lawyer Mentoring Program pairs newly admitted Ohio lawyers with experienced attorneys to support their transition into practice. The program's purpose is to elevate the competence, professionalism, and success of Ohio lawyers through meaningful mentorship.

#### 2. Look to the following principles to apply during your mentoring relationship.

##### **Don't Recreate the Wheel**

Learn from your mentor's experience. Their successes and missteps can guide your own path.

##### **I Never Got the Memo**

Your mentor will help you navigate the unwritten rules and practical skills not taught in law school.

##### **No Question Is a Stupid Question**

Ask freely—your mentor is there to support you, no matter how small the question may seem.

##### **Let Me Introduce You to . . .**

Your mentor can connect you with other professionals and point you toward valuable learning opportunities, whether through bar associations, events, or informal introductions.

While your mentor may offer career advice, job placement is not part of the program. Please do not pressure your mentor to help you find employment.

### B. The Mentoring Term: So How Long Does this Relationship Last?

The mentoring term lasts for about a year. **You are expected to maintain your mentoring relationship for the entire term.**

Schedule		
Swearing In	Start of Term	End of Term
November	February	December
May	August	June

## C. What You Will Be Doing All Year: The Mentoring Plan

### 1. The Curriculum

Think of the Mentoring Plan as your personalized roadmap for the year. You and your mentor will choose from a list of approved topics and activities designed to support your growth as a professional. The Commission on Professionalism identified these activities as essential to your development as a professional.

You are encouraged to tailor the plan to your practice setting, goals, and interests, to make the experience most relevant and rewarding.

**Note:** The Mentoring Plan can be updated at any time through the portal.

### 2. Your First Meeting

You will create your Mentoring Plan at your first meeting utilizing [Worksheet A](#). As the mentee, **you are responsible for initiating your first meeting with your mentor**. During this meeting, you should determine together how you will plan and schedule future meetings.

### 3. Mandatory Topics

As part of the curriculum, every participant must engage in a discussion about **mental health and substance use issues**, as well as a discussion about **pro bono service and access to justice**.

### 4. Curriculum Worksheets

To assist you and your mentor with your discussions, the Commission developed curriculum worksheets available on the [Lawyer to Lawyer Mentoring Program Website](#). A lettered worksheet is referenced next to each topic on the Mentoring Plan. Each worksheet is a tool for you and your mentor to use to facilitate your discussion about the corresponding topic.

Worksheets and the discussion questions they contain are valuable starting points for conversations with your mentor, however, they are **not** required to be completed. Feel free to explore other topics with your mentor that come up naturally in your work or practice. The goal is to foster meaningful dialogue that supports your professional growth.

### 5. Pro Bono

The Supreme Court of Ohio is committed to ensuring access to justice for all Ohioans. You are strongly encouraged to engage in pro bono work with your mentoring partner during the mentoring term. Doing so not only fulfills activities in your Mentoring Plan but also supports the legal profession's responsibility to serve the public and promote equal access to justice.

## D. The Mentoring Agreement

The Mentoring Agreement details the parameters of the mentoring relationship. Upon submission of your Mentoring Plan, you must electronically attest to the Mentoring Agreement.

### 1. Parameters of Your Relationship

Your mentor is meant to teach you and provide guidance to you across a variety of topics, with a particular focus on professionalism in the practice of law.

#### a. In-House Mentoring Agreement

If you are being mentored by an attorney in your same firm or organization, you have an in-house mentoring relationship. Your conversations with your mentor are safeguarded by the confidentiality that extends to all employees of your firm or organization and the shared responsibility to your clients for the actions taken on their behalf.

Accordingly, you and your mentor may discuss privileged details about client matters and determine together courses of action on those cases. The In-House Mentoring Agreement, therefore, does not restrict your conversations with your mentor.

#### b. Outside Mentoring Agreement

If you are being mentored by an attorney in a different firm or organization, you have an outside mentoring relationship. Outside mentorships have limits on the substance of their conversations. The Outside Mentoring Agreement places clear parameters on what you may discuss with your mentor. Such parameters serve to protect you, your mentor, and your respective clients.

You should discuss these issues in your first meeting with your mentor and decide together how you will handle your discussions to ensure that you abide by them. Please familiarize yourself with the parameters included in the Outside Mentoring Agreement.

**The exception to the rule:** The Outside Mentoring Agreement parameters do not apply if you and your mentoring partner are working on a pro bono matter referred by a [recognized pro bono organization](#). If you would like to work together as co-counsel on a pro bono case, select Worksheet OO in your Mentoring Plan and follow the guidance provided in those materials.

## E. Problems in the Mentoring Relationship

### 1. What if we don't get along very well?

You may not have perfect chemistry with your mentor. Worse yet, your personalities might clash.

The reality is, sometimes people conflict. As a legal professional part of your development is learning how to effectively communicate with clients, colleagues, and others, even when personalities clash, to maintain productive relationships.

If you experience a problem with your mentor, discuss the problem and jointly agree on a resolution. If this does not resolve the issues, contact program staff, who will attempt to mediate the problem between you and your mentor.

### 2. What if the mentoring relationship ends early?

Some problems could cause the mentoring relationship to end. For example, you or your mentor may move away, experience significant health problems that interfere with participation, or lose all contact. In such cases, **you are responsible** for contacting program staff.

When such situations occur, program staff will do their best to implement an alternate plan for completing your mentoring term. Decisions are made on a case-by-case basis, taking into consideration individual circumstances and other factors, such as:

- The number of completed activities/experiences of the Mentoring Plan;
- The time left in the mentoring term; and
- Whether the minimum number of mentoring hours have been completed.

### 3. Other Issues to Consider

#### a. Your mentor may be your parent's age (or your child's age).

You are likely to be in a different generation than your mentor. Therefore, it is important to discuss your assumptions and values during your relationship to avoid misunderstandings. Respect your mentor's perspective even if it is different from yours.

#### b. You may be of a different ethnicity, race, gender, or nationality.

Just as generational differences may cause misunderstanding in communication, so too can differences in ethnicity, race, gender, or nationality. You should consider your cultural assumptions and values and discuss them with your mentor to avoid miscommunication.

#### F. Evaluation

You must complete an end-of-term evaluation. This evaluation provides valuable insight into how the Commission may improve the Lawyer to Lawyer Mentoring Program.

#### G. Certificate of Satisfactory Completion

Participants must submit the Certificate of Satisfactory Completion via the Lawyer to Lawyer Mentoring Portal at the end of the term.

**The Certificate of Satisfactory Completion is not available through the portal until the last month of your mentoring term.** Participants are expected to maintain the relationship with their mentoring partner throughout the entire term.

#### H. Going Online

Use the Lawyer to Lawyer Mentoring Portal to:

- Submit your Mentoring Plan and acknowledge your Mentoring Agreement;
- Create, review, or modify your Mentoring Plan; and
- Update contact information.

Nearly all communications to you from the program will be made via email. Therefore, please promptly update your email address in the Lawyer to Lawyer Mentoring Portal if it changes.

Your mentor may not be as familiar or comfortable with online applications as you are. In such cases, consider offering to assist your mentor in making submissions.

#### I. Cost

There is no cost to mentors or mentees to participate in the Lawyer to Lawyer Mentoring Program.

#### J. New Lawyers Training Credit

Successful completion of the Program satisfies **9 hours** of General New Lawyers Training credit. To complete the remainder of your required New Lawyers Training requirement, **you must attend** 3 hours of New Lawyers Training instruction on professionalism, law practice management, and handling client funds. Use the [CLE Activity Search](#) and filter by 'New Attorney' to find applicable, accredited courses.

Once you complete **all** program requirements, please allow 48 hours for credit to be posted to your transcript. You can review your transcript through the Supreme Court of Ohio [Attorney Portal](#). Credit will be awarded no later than thirty (30) days following the last day of the term.

K. A Final Thought. . .

This program is only as valuable as you make it. Its success depends on your devotion of time to your mentoring relationship and your genuine interest in the topics you choose to discuss. So please, give it your all to enjoy its true value.

If you have any questions along the way, please don't hesitate to reach out to program staff.

Best of luck in your mentoring relationship and in your first year of practice!

**CONTACT INFORMATION**

Secretary to the Commission on Professionalism  
Supreme Court of Ohio  
65 South Front Street  
Columbus, Ohio 43215-3431  
614.387.9343  
[lawyer2lawyer@sc.ohio.gov](mailto:lawyer2lawyer@sc.ohio.gov)

Lawyer to Lawyer  
II. Timeline &  
Program Requirements

# THE SUPREME COURT *of* OHIO

## PROGRAM TIMELINE

<b>For Mentees Admitted in November:</b>	
Mentoring Term Begins	February of the Following Year
Mentoring Plans & Mentoring Agreements Due	March
Mentoring Term Ends & Certificate of Satisfactory Completion Due	December
<b>For Mentees Admitted in May:</b>	
Mentoring Term Begins	August
Mentoring Plans & Mentoring Agreements Due	September
Mentoring Term Ends & Certificate of Satisfactory Completion Due	June of the Following Year

Visit the [Lawyer to Lawyer Mentoring Program Website](#) for Specific Due Dates.

### PROGRAM CHECKLIST

- Read the orientation guide **in its entirety**
- Contact your mentor and schedule your first meeting
- Submit Mentoring Plan and Agreement:
  - Before or during your first meeting, review the Mentoring Plan and Agreement
  - Use Worksheet A to discuss goals and expectations
  - Submit both documents via the portal by the due date
- Meet Regularly:
  - Attend at least six meetings (in-person or video) totaling nine hours
  - Complete all activities selected in the Mentoring Plan
- Complete the end-of-term evaluation
- Submit Certificate of Satisfactory Completion

## Lawyer to Lawyer

### III. Mentoring Plan & Required Forms

## LAWYER TO LAWYER MENTORING PROGRAM MENTORING PLAN

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### INTRODUCTION TO THE MENTORING PLAN

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The Mentoring Plan includes core concepts, lawyering skills, activities, and experiences that should be used as learning activities for the mentee and mentor and as topics for discussion between them. The activities and experiences are an introduction to the topics with which lawyers need to be familiar for the successful and professional practice of law.

The Mentoring Plan topics and activities are broken up into five categories:

- Legal Community and the Community at Large;
- Personal and Professional Development;
- Ethics;
- Law Practice Management; and
- Communication, Advocacy, and Negotiation.

The Mentoring Plan should be developed by the mentor and mentee together during their first meeting and must be submitted at the start of the mentoring term via the [Lawyer to Lawyer Mentoring Portal](#). Each individualized Mentoring Plan should incorporate the activities and experiences most applicable to the practice setting, individual needs, interests, and personal goals of the mentee.

The Mentoring Plan is the checklist of activities that participants are required to complete together by the end of their mentoring term.

The activities and experiences listed in the Mentoring Plan refer to Worksheets, which are intended to be resources to facilitate discussions on the corresponding topics. Completion of the Worksheets is not mandatory, but participants are encouraged to use them as guides to discussions.

In addition to the discussion topics selected in the Mentoring Plan, mentees are encouraged to discuss other career issues that arise in their early practice experience with their mentors.

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## MENTORING PLAN INSTRUCTIONS

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To prepare the participants for their first meeting and to facilitate discussion about this Mentoring Plan, participants are encouraged to refer to [Worksheet A](#) .

The Mentoring Plan must be completed online via the Lawyer to Lawyer Mentoring Program Portal. Log in to the portal and click “View/Submit your mentoring plan” to begin your plan.

The activities and experiences in the Mentoring Plan are grouped by topic. Instructions accompany each topic indicating the minimum number of activities that must be elected in each section. **The topics and activities can be completed in any order, but the minimum number of activities for election is mandatory.**

Next to each activity description is a box that should be checked if the mentee elects to participate in that activity. **Every participant must engage in a discussion about mental health and substance use issues, as well as a discussion about pro bono service and access to justice.**

To assist with discussions, the Commission developed curriculum worksheets available on the [Lawyer to Lawyer Mentoring Program Website](#). A lettered worksheet is referenced next to each topic on the Mentoring Plan. Each worksheet is a tool for you and your mentor to use to facilitate your discussion about the corresponding topic. Worksheets contain talking points and suggestions for issues to discuss, as well as links to other resources that you and your mentor can read and talk about.

Worksheets and the discussion questions they contain are valuable starting points for conversations with your mentor; however, feel free to discuss other topics with your mentor that arise in the course of your work. Mentors also should provide a meaningful review and suggestions for practical application of the concepts found in *A Lawyer’s Creed*, *A Lawyer’s Aspirational Ideals*, and *Professionalism Dos and Don’ts* in regard to each Mentoring Plan topic.

To successfully complete the Lawyer to Lawyer Mentoring Program, all of the activities elected must be completed by the end of the mentoring term. The completed and executed Mentoring Plan must be submitted by the mentee to the Commission on Professionalism via the [Lawyer to Lawyer Mentoring Portal](#), along with the executed Mentoring Agreement, at the start of the mentoring term.

You can access and change your Mentoring Plan at any time through the portal. However, feel free to print and complete the form included in this manual if you would like to reference a hardcopy.

**LAWYER TO LAWYER MENTORING PROGRAM  
MENTORING AGREEMENT**

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**INTRODUCTION TO THE MENTORING AGREEMENT**

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After completing your Mentoring Plan, both you and your mentor must acknowledge an in house or outside Mentoring Agreement. The Mentoring Agreement is an agreement about the parameters of the mentoring relationship that you must discuss and complete via the Lawyer to Lawyer Mentoring Program Portal after you submit your Mentoring Plan.

I. Parameters of Your Relationship

If both mentor and mentee work within the same firm or organization, they must acknowledge the In-House Mentoring Agreement. If the mentor and mentee work in different firms or organizations, they must acknowledge the Outside Mentoring Agreement.

II. In-House Mentoring Agreement

In-house mentoring conversations are safeguarded by the confidentiality that extends to all employees of your firm or organization and the shared responsibility to your clients for the actions taken on their behalf. Accordingly, mentor and mentee are able to discuss privileged details about client matters and determine together courses of action on those cases.

III. Outside Mentoring Agreement

The Outside Mentoring Agreement places clear parameters on what mentoring participants may discuss. **Such parameters serve to protect the mentee, mentor, and respective clients.** Participants should discuss these issues in their first meeting and decide together how to your discussions to ensure that you abide by them. Please familiarize yourself with the following parameters.

a. The mentee is not the mentor's client.

The mentoring relationship does not create a confidential or privileged relationship between mentee and mentor. Participants should be discreet and respectful with confidences. Participants should discuss expectations about discretion during their first meeting. The mentoring relationship should be a safe space to share vulnerable feelings, experiences, or questions.

- b. **Participants are prohibited from discussing privileged information about clients or their cases.**

Instead, limit discussions to hypothetical situations. Additionally, participants are expected to exercise professional judgment on behalf of their clients. A mentor's guidance is not considered legal advice, nor is he or she taking responsibility for whatever course of action a mentee may ultimately decide upon. Mentees may have an ethical obligation to associate themselves with competent counsel to provide competent representation to a client.

- c. Participants are not a source of referrals for each other.
- d. Participants are not associates. Co-counseling cases during the mentoring term is prohibited.

**The exception to the rule: The above parameters do not apply if you and your mentoring partner are working on a pro bono matter referred by a pro bono provider.**

Participants are encouraged to do pro bono work during their mentoring term. If you and your mentoring partner choose to engage in a pro bono activity coordinated by a pro bono provider or co-counsel on a case provided by a pro bono provider, the above parameters do not apply to that work. If you would like to work together as co-counsel on a pro bono case, please select Worksheet OO in your Mentoring Plan and follow the guidance provided in those materials.

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#### MENTORING AGREEMENT INSTRUCTIONS

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After completing your Mentoring Plan via the [Lawyer to Lawyer Mentoring Portal](#), click 'Submit Mentorship Agreement' to access the Mentoring Agreement.

Select the type of agreement – either In-House or Outside – and follow the prompts to attest to the agreement.

**LAWYER TO LAWYER MENTORING PROGRAM  
CERTIFICATE OF SATISFACTORY COMPLETION OF PROGRAM  
AND END OF TERM EVALUATION**

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**INTRODUCTION TO THE CERTIFICATE OF SATISFACTORY COMPLETION  
AND END OF TERM EVALUATION**

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Participants must submit the Certificate of Satisfactory Completion and End of Term Evaluation to receive NLT or CLE credit.

Completing the end-of-term evaluation is a vital part of strengthening the Lawyer to Lawyer Mentoring Program. Your feedback helps us understand what's working well and where we can improve, ensuring the program continues to meet the evolving needs of Ohio's legal community. The evaluation takes approximately 10 minutes to complete. We truly value your insights and appreciate your time in helping us grow.

The Certificate of Satisfactory Completion is not available through the portal **until the last month of your mentoring term**. As a reminder, participants are expected to maintain the relationship with their mentoring partner throughout the entire term.

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**CERTIFICATE OF SATISFACTORY COMPLETION  
AND END OF TERM EVALUATION INSTRUCTIONS**

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Information regarding the Certificate of Satisfactory Completion and End of Term Evaluation will be sent via **email** in the last month of the mentoring term.

A link will be included in the end of term email to access the evaluation. Please complete it in its entirety.

To complete the Certificate of Satisfactory Completion, log in to the [Lawyer to Lawyer Mentoring Portal](#) and complete the attestation.

Lawyer to Lawyer  
II. Timeline &  
Program Requirements

# THE SUPREME COURT *of* OHIO

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Mentoring Term Ends & Certificate of Satisfactory Completion Due	June of the Following Year

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### PROGRAM CHECKLIST

- Read the orientation guide **in its entirety**
- Contact your mentor and schedule your first meeting
- Submit Mentoring Plan and Agreement:
  - Before or during your first meeting, review the Mentoring Plan and Agreement
  - Use Worksheet A to discuss goals and expectations
  - Submit both documents via the portal by the due date
- Meet Regularly:
  - Attend at least six meetings (in-person or video) totaling nine hours
  - Complete all activities selected in the Mentoring Plan
- Complete the end-of-term evaluation
- Submit Certificate of Satisfactory Completion



Lawyer to Lawyer  
IV. Appendices

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**MENTORING PLAN ACTIVITIES AND EXPERIENCES**

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Please complete your Mentoring Plan via the Lawyer to Lawyer Mentoring Portal. The following form may be used as a reference but you **must** make your formal selections through the Portal.

**THE LEGAL COMMUNITY & THE COMMUNITY AT LARGE**

At least one activity or experience from this section must be elected in addition to a discussion about pro bono service/access to justice issues.

Elected	Activity or Experience
	<b>Introduction to Mentor's Office:</b> Activities may include meeting at and touring the mentor's office, introducing the mentee to lawyers and staff at the mentor's firm or organization, and/or other discussion of basic workplace expectations and how office personnel work together as a team. (This activity is for participants in outside mentoring relationships only.) <i>See Worksheet B.</i>
	<b>Introduction to the Organized Bar:</b> Activities may include introducing the mentee to colleagues and/or other lawyers, attending a bar association meeting together, attending a Courthouse Connections event or bar association reception sponsored by the Lawyer to Lawyer Mentoring Program, and/or discussing local, state, and national bar associations, including the advantages of being involved in bar association activities. <i>See Worksheet C.</i>
	<b>Introduction to the Courthouse:</b> Activities may include attending a Courthouse Connections event sponsored by the Lawyer to Lawyer Mentoring Program, touring the local courthouse where the mentee will be appearing, and/or introducing the mentee to judges, magistrates, bailiffs, administrative assistants, and other court staff. If the mentee and mentor practice criminal law, activities may include visiting the local jail, if feasible, and/or explaining procedures for jailhouse visits. <i>See Worksheet D.</i>
	<b>Introduction to Unwritten Customs and Rules:</b> Activities may include discussing unwritten, customary rules of civility and etiquette among lawyers and judges in the community, and/or discussing professionalism ideals, such as those expressed in <i>A Lawyer's Creed</i> , <i>A Lawyer's Aspirational Ideals</i> , and <i>Professionalism Dos and Don'ts</i> . <i>See Worksheet E.</i>

<p style="text-align: center;">√ required</p>	<p><b>Introduction to Pro Bono, Civic, and Charitable Activities:</b> Activities may include attending a Give Back for Justice event sponsored by the Lawyer to Lawyer Mentoring Program; discussing the importance of pro bono providers, such as Legal Aid associations, in ensuring access to justice; and/or discussing opportunities for lawyers to engage in pro bono activities and do civic and charitable work. Mentoring partners may choose to engage in a pro bono activity coordinated by a pro bono provider, including co-counseling on a pro bono matter as set forth in Worksheet OO. <i>See Worksheet F.</i></p>
	<p><b>Other Activity/Experience:</b> Subject to Commission approval, create your own activity/experience that (1) furthers the mentee's engagement with the legal community and community at large, and (2) has the primary objective to improve the mentee's professional competence.</p> <p>Describe the proposed activity/experience:</p>

## PERSONAL & PROFESSIONAL DEVELOPMENT

At least one activity or experience from this section must be elected in addition to a discussion about mental health and substance use issues.

Elected	Activity or Experience
	<p><b>Introduction to Career Objectives and Career Paths:</b> Activities may include discussing the mentee’s long-term career objectives and identifying ways to meet those goals; discussing different career paths, such as large and small firms, government and non-profit practice, and non-traditional legal positions; and/or identifying resources for exploring these options. <i>See Worksheet G.</i></p>
	<p><b>Introduction to Career Satisfaction:</b> Activities may include discussing how to find career satisfaction, including techniques for finding a balance between career and personal life, putting daily pressures into perspective, reconciling job expectations with actual experience, and/or maximizing career satisfaction. <i>See Worksheet H.</i></p>
	<p><b>Introduction to Diversity &amp; Inclusion:</b> Activities may include discussing the importance of creating an inclusive and diverse workplace environment, increasing the diversity and inclusiveness of the profession as a whole, and way to achieve such these objectives. <i>See Worksheet I.</i></p>
<p>✓ required</p>	<p><b>Introduction to Mental Health and Substance Use Issues:</b> Activities may include discussing mental health and substance use issues, such as possible warning signs of mental health or substance use issues; what to do if the mentee, a colleague, or a superior is faced with a mental health or substance use problem; and/or resources for assistance with mental health or substance use issues. <i>See Worksheet J.</i></p>
	<p><b>Introduction to Addressing/Preventing Sexual Harassment:</b> Activities may include discussing the existence and prevalence of sexual harassment in the legal profession; effective ways for lawyers to recognize, prevent, address, stop, and/or report sexual harassment; and/or the mentor’s personal experience with addressing sexual harassment issues in the workplace or profession. <i>See Worksheet K.</i></p>
	<p><b>Introduction to Management of Law School Debt:</b> Activities may include discussing practical ways for the mentee to manage law school debt and/or stories of the mentor’s personal experience handling law school debt. <i>See Worksheet L.</i></p>

	<p><b>Introduction to Job Searching for Lawyers:</b> Activities may include discussing legal job-search strategies and/or sharing the mentor’s personal experience with successful and unsuccessful job searching techniques. <i>See Worksheet M.</i></p>
	<p><b>Introduction to Social Media/Technology:</b> Activities may include discussing appropriate use of social media by lawyers, including ethical obligations, effective use of social media for professional development, and using social media responsibly and professionally. <i>See Worksheet N.</i></p>
	<p><b>Other Activity/Experience:</b> Subject to Commission approval, create your own activity/experience that (1) furthers the mentee’s personal and/or professional development and (2) has the primary objective to improve the mentee’s professional competence.</p> <p>Describe the proposed activity/experience:</p>

## ETHICS

At least one activity or experience from this section must be elected.

Elected	Activity or Experience
	<p><b>Introduction to Malpractice and Grievance Traps:</b> Activities may include discussing common malpractice and grievance traps, including ways to recognize and avoid pitfalls. <i>See Worksheet O.</i></p>
	<p><b>Introduction to Resources for Ethical Issues:</b> Activities may include discussing potential resources for dealing with complicated ethical issues, such as conflicts of interests. If the mentoring relationship is an in-house relationship, the mentor may discuss the firm or organization's procedures for assisting with complicated ethical issues. <i>See Worksheet P.</i></p>
	<p><b>Introduction to Malpractice Insurance:</b> Activities may include discussing malpractice insurance in the legal field, such as the benefits of carrying malpractice insurance and lawyers' obligations in the event of failing to carry insurance. <i>See Worksheet Q.</i></p>
	<p><b>Introduction to Reporting Lawyer and Judicial Misconduct:</b> Activities may include discussing different areas of lawyer misconduct, such as appropriate and inappropriate ways to handle situations where the mentee believes another lawyer (either inside or outside of the mentee's organization) or a judge has committed an ethical violation; the mentee's obligation to report misconduct; and/or appropriate and inappropriate ways to handle a situation where the mentee has been asked by a senior member of the organization to do something that is unethical or unprofessional. <i>See Worksheet R.</i></p>
	<p><b>Introduction to the Grievance Process:</b> Activities may include discussing the grievance process, such as a lawyer's duty to cooperate with a disciplinary investigation. <i>See Worksheet S.</i></p>
	<p><b>Other Activity/Experience:</b> Subject to Commission approval, create your own activity/experience that (1) furthers the mentee's engagement with ethical issues, and (2) has the primary objective to improve the mentee's professional competence.</p> <p>Describe the proposed activity/experience:</p>

## LAW PRACTICE MANAGEMENT

At least two activities or experiences from this section must be elected.

Elected	Activity or Experience
	<b>Introduction to Law Practice Management:</b> Activities may include touring a law office, such as the mentor's, learning how the law office is managed, discussing how practice management systems are implemented, and/or discussing resources where the mentee can learn more about office management issues. <i>See Worksheet T.</i>
	<b>Introduction to Time Management:</b> Activities may include discussing good time management skills and techniques and/or discussing time management techniques that have been successful or unsuccessful for the mentor. <i>See Worksheet U.</i>
	<b>Introduction to Client Confidentiality:</b> Activities may include discussing practices to maintain client confidentiality and/or discussing the mentor's personal experience with confidentiality issues. <i>See Worksheet V.</i>
	<b>Introduction to Conflicts of Interest:</b> Activities may include discussing how to screen for, recognize, and avoid conflicts. <i>See Worksheet W.</i>
	<b>Introduction to Office Personnel:</b> Activities may include discussing roles and responsibilities of office personnel, such as paralegals and secretaries, and/or how to establish good working relationships with others in the same office who are support staff, peers, or senior colleagues. <i>See Worksheet X.</i>
	<b>Introduction to the Unauthorized Practice of Law:</b> Activities may include discussing how to prevent issues of unauthorized practice of law with staff and/or discussing the mentor's personal experience with UPL issues. <i>See Worksheet Y.</i>
	<b>Introduction to Office Politics:</b> Activities may include discussing office politics, including appropriate networking, socializing, and personal behaviors. <i>See Worksheet Z.</i>
	<b>Introduction to Planning for Retirement, Death, or Disability:</b> Activities may include discussing the importance of planning ahead for handling a lawyer's practice in the event of the lawyer's retirement, death, or disability. <i>See Worksheet AA.</i>
	<b>Introduction to Leaving a Firm:</b> Discuss the issues surrounding leaving a firm, such as how to protect oneself, advising clients, and withdrawing from cases. <i>See Worksheet BB.</i>

	<p><b>Other Activity/Experience:</b> Subject to Commission approval, create your own activity/experience that (1) furthers the mentee's knowledge of law practice management, and (2) has the primary objective to improve the mentee's professional competence.</p>
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Describe the proposed activity/experience:

## COMMUNICATION, ADVOCACY, & NEGOTIATION

At least two activities or experiences from this section must be elected.

Elected	Activity or Experience
	<b>Introduction to Client Development:</b> Activities may include discussing methods of client development, such as those that have been successful or unsuccessful for the mentor, and/or other techniques for business development, including any relevant ethical concerns and best practices in this regard. <i>See Worksheet CC.</i>
	<b>Introduction to Client Decision-Making &amp; Involvement:</b> Activities may include discussing which decision-making responsibilities are the client's and which are the lawyer's, and/or the best ways to involve a client in their case. <i>See Worksheet DD.</i>
	<b>Introduction to Case Evaluation:</b> Activities may include discussing the best ways to evaluate a potential case and/or how to decide whether to accept a proffered representation. <i>See Worksheet EE.</i>
	<b>Introduction to Difficult Clients:</b> Activities may include discussing how to deal with a "difficult" client, and/or discussing the mentor's personal experience with "difficult" clients. <i>See Worksheet FF.</i>
	<b>Introduction to Client Communication:</b> Activities may include discussing the importance of client communication, such as how to maintain good ongoing communication, the use of retention and fee agreements, keeping clients informed about matters, written confirmations, being on time, etc. <i>See Worksheet GG.</i>
	<b>Introduction to Legal Counseling:</b> Activities may include discussing proper and improper legal counseling techniques, and/or duties and responsibilities of advising clients. <i>See Worksheet HH.</i>
	<b>Introduction to Dealing with Others:</b> Activities may include discussing appropriate ways (including ethical concerns, etiquette, etc.) of dealing with others on behalf of a client, and/or discussing the mentor's personal experience in this regard. <i>See Worksheet II.</i>
	<b>Introduction to Depositions:</b> Activities may include attending a deposition and/or discussing tips for deposition preparation, appropriate behavior, and professional demeanor during the deposition. <i>See Worksheet JJ.</i>

	<p><b>Introduction to Negotiation:</b> Activities may include discussing important aspects of negotiation, such as preparing for negotiation, when and how negotiations are initiated, involving a client in negotiation, ethical and professional obligations in negotiation, successful tips for negotiating with another lawyer, and/or resources to help develop negotiation skills. <i>See Worksheet KK.</i></p>
	<p><b>Introduction to Legal Writing:</b> Activities may include discussing relevant issues regarding legal writing, such as techniques for effectiveness, how to avoid common mistakes causing pleadings to be rejected, how to effectively use sample legal pleadings and forms, techniques to conduct efficient legal research, etc. <i>See Worksheet LL.</i></p>
	<p><b>Introduction to Alternative Dispute Resolution:</b> Activities may include discussing the different types of alternative dispute resolution, such as mediation, binding and non-binding arbitration, high-low arbitration, early neutral evaluation, court-annexed arbitration, summary jury trials, etc., and/or the benefits and disadvantages of each. Mentoring participants may choose to attend a mediation or arbitration together. <i>See Worksheet MM.</i></p>
	<p><b>Introduction to Appellate Courts:</b> Activities may include observing, in person or by streaming video online, an appellate argument in the Supreme Court of Ohio, Ohio appellate district court, or United States circuit court, and/or discussing techniques and tips for effective oral argument. <i>See Worksheet NN.</i></p>
	<p><b>Introduction to Co-Counseling in a Pro Bono Case:</b> Activities may include discussing co-counseling arrangements and how to determine when such an arrangement is mutually beneficial for attorneys and otherwise appropriate. If schedules permit, mentoring participants may work together as co-counsel on a pro bono case assigned by a pro bono provider. <i>See Worksheet OO.</i></p>
	<p><b>Other Activity/Experience:</b> Subject to Commission approval, create your own activity/experience that (1) furthers the mentee’s knowledge of professional communication, advocacy, and/or negotiation skills, and (2) has the primary objective to improve the mentee’s professional competence.</p> <p>Describe the proposed activity/experience:</p>

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**MENTORING AGREEMENT  
IN-HOUSE MENTORING RELATIONSHIPS**

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Instructions: Please complete the Mentoring Agreement via the Lawyer to Lawyer Mentoring Portal.

I agree to participate in the Lawyer to Lawyer Mentoring Program (the "Program") in accordance with its rules. I understand that the Program relies on the development of a one-on-one mentoring relationship that primarily entails coaching, recounting experiences, lesson-sharing, and providing support.

I acknowledge the specific goals of the Program:

- To foster the development of the mentee's practical skills and increase his or her knowledge of legal customs;
- To create a sense of pride and integrity in the legal profession;
- To promote collegial relationships among legal professionals and involvement in the bar;
- To improve legal ability and professional judgment; and
- To encourage the use of best practices and highest ideals in the practice of law.

The mentee agrees to waive all claims against, and to hold harmless, the mentor and the Supreme Court of Ohio, and their respective employees and agents, for any actions or inactions associated with the Program or with the mentee's participation in the same.

I pledge to devote the time and effort needed to complete the activities selected in our Mentoring Plan.

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**MENTORING AGREEMENT  
OUTSIDE MENTORING RELATIONSHIPS**

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**Instructions:** Please complete the Mentoring Agreement via the [Lawyer to Lawyer Mentoring Portal](#).

I agree to participate in the Lawyer to Lawyer Mentoring Program (the “Program”) in accordance with its rules. I understand that the Program relies on the development of a one-on-one mentoring relationship that primarily entails coaching, recounting experiences, lesson-sharing, and providing support.

I acknowledge the specific goals of the Program:

- To foster the development of the mentee’s practical skills and increase his or her knowledge of legal customs;
- To create a sense of pride and integrity in the legal profession;
- To promote collegial relationships among legal professionals and involvement in the bar;
- To improve legal ability and professional judgment; and
- To encourage the use of best practices and highest ideals in the practice of law.

**Except for any pro bono work that the mentor and mentee agree to undertake jointly,**

I acknowledge that the following parameters apply to the mentoring relationship:

- The mentor will not co-counsel any matter with the mentee, nor will the mentor make referrals to or accept referrals from the mentee during the term of their mentoring relationship through the Program.
- Any communication between the mentor and mentee is not intended to be the rendering of legal or professional advice to the mentee or his or her client, and the mentee will not rely upon such communications or cause any client to rely upon them. The mentee will rely solely upon his/her own judgment, legal opinions, or independent research.
- Any communication between the mentor and mentee arising out of participation in the Program is for the sole purpose of guiding and teaching the mentee about the practice of law and the issues that the mentee is likely to face in the practice of law.

- No confidential relationship is formed between the mentor and mentee as a result of participation in the Program. The mentee will not identify any client of the mentor or reveal to the mentor any client confidence, nor will the mentee seek professional or legal advice from the mentor about specific legal matters or clients. Instead all discussions about substantive legal matters between the mentee and mentor will be limited to hypotheticals.
- The 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 or take any responsibility for any aspect of representation of the mentee's clients.

The mentee agrees to waive all claims against, and to hold harmless, the mentor and the Supreme Court of Ohio, and their respective employees and agents, for any actions or inactions associated with the Program or with the mentee's participation in the same.

I pledge to devote the time and effort needed to complete the activities selected in our Mentoring Plan.

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**LAWYER TO LAWYER MENTORING PROGRAM  
CERTIFICATE OF SATISFACTORY COMPLETION OF PROGRAM**

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**Instructions:** Please complete the Certificate of Satisfactory Completion via the Lawyer to Lawyer Mentoring Portal.

The mentee and mentor each certify the following:

1. The mentee has satisfactorily completed the Lawyer to Lawyer Mentoring Program;
2. We completed all activities elected in the Mentoring Plan;
3. We participated in a discussion about substance use and mental health issues;
4. We participated in a discussion about pro bono service/access to justice issues; and
5. We had at least six in-person meetings over the course of the term for a minimum of nine mentoring hours.

I hereby certify that the above information is true and accurate to the best of my knowledge.



Office of Attorney Services  
65 South Front Street  
Columbus, Ohio 43215-3431  
[www.supremecourt.ohio.gov](http://www.supremecourt.ohio.gov)  
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