
MENTORING PLAN ACTIVITIES AND EXPERIENCES

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
	Introduction to Mentor's Office: 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>
	Introduction to the Organized Bar: 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>
	Introduction to the Courthouse: 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>
	Introduction to Unwritten Customs and Rules: 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>✓ required</p>	<p>Introduction to Pro Bono, Civic, and Charitable Activities: 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>Other Activity/Experience: 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
	Introduction to Career Objectives and Career Paths: 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>
	Introduction to Career Satisfaction: 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>
	Introduction to Diversity & Inclusion: 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>
<div style="text-align: center;">✓ required</div>	Introduction to Mental Health and Substance Use Issues: 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>
	Introduction to Addressing/Preventing Sexual Harassment: 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>
	Introduction to Management of Law School Debt: 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>Introduction to Job Searching for Lawyers: 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>Introduction to Social Media/Technology: 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>Other Activity/Experience: 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
	Introduction to Malpractice and Grievance Traps: Activities may include discussing common malpractice and grievance traps, including ways to recognize and avoid pitfalls. <i>See Worksheet O.</i>
	Introduction to Resources for Ethical Issues: 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>
	Introduction to Malpractice Insurance: 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>
	Introduction to Reporting Lawyer and Judicial Misconduct: 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>
	Introduction to the Grievance Process: Activities may include discussing the grievance process, such as a lawyer's duty to cooperate with a disciplinary investigation. <i>See Worksheet S.</i>
	Other Activity/Experience: 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. Describe the proposed activity/experience:

LAW PRACTICE MANAGEMENT

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

Elected	Activity or Experience
	Introduction to Law Practice Management: 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>
	Introduction to Time Management: 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>
	Introduction to Client Confidentiality: 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>
	Introduction to Conflicts of Interest: Activities may include discussing how to screen for, recognize, and avoid conflicts. <i>See Worksheet W.</i>
	Introduction to Office Personnel: 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>
	Introduction to the Unauthorized Practice of Law: 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>
	Introduction to Office Politics: Activities may include discussing office politics, including appropriate networking, socializing, and personal behaviors. <i>See Worksheet Z.</i>
	Introduction to Planning for Retirement, Death, or Disability: 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>
	Introduction to Leaving a Firm: 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>Other Activity/Experience: 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> <p>Describe the proposed activity/experience:</p>
--	--

COMMUNICATION, ADVOCACY, & NEGOTIATION

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

Elected	Activity or Experience
	Introduction to Client Development: 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>
	Introduction to Client Decision-Making & Involvement: 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>
	Introduction to Case Evaluation: 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>
	Introduction to Difficult Clients: 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>
	Introduction to Client Communication: 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>
	Introduction to Legal Counseling: Activities may include discussing proper and improper legal counseling techniques, and/or duties and responsibilities of advising clients. <i>See Worksheet HH.</i>
	Introduction to Dealing with Others: 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>
	Introduction to Depositions: 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>Introduction to Negotiation: 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>Introduction to Legal Writing: 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>Introduction to Alternative Dispute Resolution: 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>Introduction to Appellate Courts: 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>Introduction to Co-Counseling in a Pro Bono Case: 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>Other Activity/Experience: 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>