

LAWYER TO LAWYER MENTORING PROGRAM MENTORING PLAN

INTRODUCTION TO THE MENTORING PLAN

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, along with the Mentoring Agreement, to the Commission on Professionalism 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 particular practice setting, individual needs, interests, and personal goals of the mentee.

The Mentoring Plan is the checklist of activities that the mentee and mentor 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. 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.

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

MENTORING PLAN INSTRUCTIONS

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.

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.

After selecting your topics and activities, click ‘Submit Mentoring Plan’ to access the Mentoring Agreement. 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**

INTRODUCTION TO THE MENTORING AGREEMENT

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

The relationship created between you and your mentor is a teaching 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.

If you are being mentored by an attorney in your same firm or organization, you have an in-house mentoring relationship. You must therefore acknowledge the In-House Mentoring Agreement with your mentor. If you are being mentored by an attorney in a different firm or organization, you have an outside mentoring relationship. In that case, you must acknowledge the Outside Mentoring Agreement.

II. In-House Mentoring Agreement

If you are being mentored in-house, 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 are able to 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.

Instead, the In-House Mentoring Agreement that you sign with your mentor is an acknowledgment of the objectives of the mentoring program. During your first meeting, you should discuss with your mentor these program objectives as well as your own individual objectives so that you are both comfortable with your goals.

An important consideration for you and your in-house mentor to discuss is the nature of your relationship with your mentor in your office or firm. For example, your mentor may be a supervisor who assigns and evaluates your work, may be a managing partner with input into which associates make partner and when, or may be an attorney in a different practice group than yours and have no relationship to you other than being your mentor. You should discuss with your mentor how your mentoring conversations will be handled in relation to

the other functions he or she has within the firm or organization. Essentially, you need to be aware now of whether your mentoring conversations will be a part of your evaluation by your mentor or how discreet your mentor will be with your conversations, especially in the case that you identify in-house problems to your mentor or share frustration about supervisors or colleagues.

III. Outside Mentoring Agreement

If you are being mentored by someone outside of your firm or organization, you have limits on the substance of your conversations with your mentor. Accordingly, 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 following parameters.

a. You are not your mentor's client.

The mentoring relationship does not create a confidential or privileged relationship between you and your mentor. Obviously, both you and your mentor should be discreet and respectful when you confide in one another. However, there is ultimately no confidential relationship formed by mentoring.

Because of this, you should discuss your expectations about discretion during your first meeting. You should attempt to build a trusting relationship with your mentor and create a safe space to share your feelings, experiences, or questions that you feel uncomfortable asking anyone else.

b. Your clients are not your mentor's clients.

Because your conversations are not privileged and it is entirely possible that your clients could have a conflict with your mentor's clients, you are prohibited from discussing privileged information about your clients or their cases. Instead, you should limit your discussions to hypothetical situations.

Additionally, you are expected to exercise your own professional judgment on behalf of your clients. If you seek general guidance from your mentor about a course of action in your client's case, your mentor's guidance is not considered legal advice, nor is he or she taking responsibility for whatever course of action you ultimately decide upon. If you are really lost on a particular case, you may have an ethical obligation to associate yourself with competent counsel to provide competent representation to your client.

- c. You are not a source of referrals for each other. Referrals to or from your mentor are prohibited.
- d. You are not associates. Co-counseling cases during the mentoring term is prohibited.
- e. **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.**

Mentors and mentees 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.

MENTORING AGREEMENT INSTRUCTIONS

After selecting your topics and activities via the [Lawyer to Lawyer Mentoring Portal](#), click 'Submit Mentoring Plan' to access the Mentoring Agreement.

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

The Mentoring Plan and Mentoring Agreement must be submitted via the Lawyer to Lawyer Mentoring Portal, however, you may print and complete the included hard copy for your reference. Mentoring Plans and Agreements submitted outside of the Lawyer to Lawyer Mentoring Portal will not be accepted as complete.

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>
✓ required	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>