LOUISIANA STATE BAR ASSOCIATION

TIP MENTORING

Transition Into Practice

Mentee Handbook

Louisiana State Bar Association

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INTRODUCTION

As a newly admitted attorney, there are many obstacles you will face when starting your career. Many of you are, or considering, hanging out your own shingle. Some of you are heading to a firm, some may be entering public service, and others may be finding a more non-traditional route. No matter your particular path, one issue you likely all have in common is a lack of practical application of the law you spent so long studying. Without the benefit of experience, you are bound to run into a number of questions and concerns you will need help with as you are getting started in your career. The everyday aspects of practicing law are not something you will be familiar with coming out of school. A mentor can help with that. The LSBA's Committee on the Profession recognized this particular need in the legal community and established the "Transition Into Practice" or TIP Mentoring Program for this purpose.

This is a critical time in your development as an attorney and by choosing to begin with a mentor, you are starting off on the right foot. The LSBA's Committee on the Profession is committed to establishing professionalism throughout the legal community in Louisiana and the TIP Program is part of that initiative. You will learn practical skills, as well as professionalism, and what is expected of you as a member of the Louisiana State Bar Association. The time investment you are making with this program will pay great dividends as you move from law school into the practice of law. The LSBA and Supreme Court want to make that transition as smooth as possible and this program is here for you.

The TIP Mentoring Program seeks to impart the wisdom, character, and experience of more veteran attorneys to new attorneys. By pairing you with a mentor for at least one year, you will get experiences you did not receive in law school. You will receive knowledge, skills, and practical experience from seasoned attorneys excited to share what they have learned from their time in the field. They will introduce you to networking opportunities and help you navigate them. By giving you access to veteran attorneys and more resource materials, the LSBA and the Committee on the Profession are aiming to strengthen the legal profession as whole in Louisiana.

The TIP Program and activities included in this Handbook shouldn't be viewed as checklist you are trying to get through. You should take your time to listen and take in everything you can from your time with your mentor and your experiences. You will also have things to teach your mentor. Mentors always relay how much they gain from their time in the program. You and your mentor should learn from one another during your TIP period and form a relationship that lasts beyond your official time together. The ultimate goal is to develop a relationship during your time in the TIP Program that you can carry with you throughout your career.

This Handbook includes instructions on enrolling in the TIP Program, what to expect and do at your first meeting, create your Personal Mentoring Plan, and certify completion. If you have questions about anything included in the Handbook, or anything not included in the Handbook, please email TIP@lsba.org or call Brooke Theobold at (504) 619-0138.

QUALIFICATIONS

Mentee

- A newly admitted LSBA attorney;
- Any area of practice, any practice type;
- Enrollment occurs on a rolling basis throughout the year online at LSBA.org/Mentoring
- Will have at least one year to complete and must enroll and complete the TIP Program before your MCLE deadline

Mentor:

- Must have been admitted into the practice of law for a period of at least ten years;
- Must have no record of suspension or disbarment from practice;
- Must have a professional liability insurance policy with minimum limits of $100,000 per occurrence and $300,000 in the aggregate; and
- Must be of good moral character, willing to voluntarily participate in the program, and commit throughout its term to the obligations and duties of being a mentor.

The professional liability insurance policy requirement is not applicable to mentors who are employed as in-house attorneys, or employed by a governmental unit, or "not for profit" entity. These are the only rules or requirements.

CLE CREDIT

Mentees will receive 12.5 hours of MCLE credit for completing the TIP Program, satisfying the CLE requirements under Rule 3(b)for newly admitted active Members, and 12.5 MCLE hours satisfying the CLE requirements for the second full calendar year following their admission.

GOALS

TIP Program Goals:

- Continue the LSBA's commitment to establish professionalism programs;
- Impart the wisdom, character, and experience of the older lawyers to younger attorneys;
- Strengthen the legal profession in Louisiana;
- Create professional relationships that a young attorney can count on throughout their career;

An additional goal of this Handbook, is the development and completion of a **Personal Mentoring Plan** to assist the Mentee with the "Transition into Law Practice." The Model Mentoring Plan supplied in this Handbook includes 11 Required Annual Activities, as well as various selectable Discussion Activities. These Activities consist of basic/foundational concepts, practical skills, experiences to facilitate learning, and suggested topics to be discussed between the Mentor and the Mentee throughout the TIP period. The Activities and Experiences have been chosen and included within this Model Mentoring Plan in an effort to help the Mentor introduce the New Lawyer to things with which all lawyers generally need to be familiar in order to be well-equipped, successful, and professional in the modern practice of law.

The Model Mentoring Plan is provided as a basic template/framework for customization and adaptation by the Mentor and Mentee into a comprehensive plan that thoughtfully reflects the specific professional goals and interests of the New Lawyer being mentored, while also offering the Mentee some exposure to both the practice and business of law. As such, a Personal Mentoring Plan that is carefully considered and well-tailored towards the individual New Lawyer who is being mentored will do much to ensure that the Mentee's Transition into Practice is truly meaningful and rewarding, not only just for the New Lawyer but also for the Mentor.

Mentees and Mentors may wish to—and are, indeed, encouraged to—explore and discuss additional topics and issues, whenever appropriate, during the TIP period. The basic Model Mentoring Plan includes simply the bare minimum required of Mentees and their Mentors in order to complete the TIP program successfully.

Likewise, although the Model Mentoring Plan essentially requires a minimum number of meetings/discussions between the Mentee and Mentor, it is hoped that they will want to find additional time and choose voluntarily to meet perhaps more than just for the minimum activities as required by the Model Mentoring Plan.

Pairing

First, Mentees are paired with a Mentor based on geographic location. This is usually the parish listed in a Mentee's member profile. If there is more than one address listed, a Mentee can add a preference on their application or later through their Personal TIP Homepage online.

Additionally, the LSBA will try to pair Mentees based on the other interests listed on their application. It is not always possible to accommodate all of these requests, but every effort will be made.

Everyone's circumstances are a little unique, and matching can take different amounts of time for everyone. Please be patient as the LSBA works to match you with a great Mentor.

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TIP MENTORING PROGRAM

MENTEE TIMELINE

DEADLINE At least one year to complete the TIP Program and must be completed by MCLE Deadline

Enroll → Paired → First Meeting & Mentoring Agreement → Complete Program Activities → Attest Activities are Completed → Evaluation → CLE Hours, Certificates, TIP Bucks

ENROLL ONLINE

LSBA Mentoring

Mentees are asked to fill out an application with as much information as possible to be matched with a suitable mentor. The LSBA asks mentees to please be patient as they are matched with a mentor from the LSBA pool. Applications are accepted throughout the year on a rolling basis.

PAIRED WITH MENTOR

Once a mentee is paired with a mentor, our system will send an email from TIP@lsba.org with their mentor's contact information and some helpful links with program material. This is their program start date.

FIRST MEETING WITH MENTOR

Mentees need to contact their assigned mentor as soon as they receive their pairing email. Mentors also receive an email with their mentee's contact information and are expecting them to reach out to them. Mentees are requested to set up their first meeting with their mentor ASAP!

MENTORING PLAN ACKNOWLEDGEMENT

TIP@lsba.org

Mentees have 45 days from their program start date to turn in the Mentoring Plan Acknowledgment (link). The Model Mentoring Plan is on pages 17-24 of the TIP Handbook. Once the mentee and mentor have gone over the TIP Handbook, filled out a plan, and signed it, that is a mentee's Personal Mentoring Plan. The last page of the Personal Mentoring Plan (page 24) is what is turned in. Please send it to TIP@lsba.org.

WORK YOUR PROGRAM

Personal Mentoring Plan

A mentee must complete 11 Annual Activities and at least 20 Discussion Activities in total. They have at least one year to complete the TIP Program. They must be finished by their MCLE deadline. Although mentors and mentees must meet at least 4 times, there is otherwise no set schedule for completing program activities. Mentees and mentors are free to work out a timeline or activity schedule that best suits their individual needs. Mentees must record their activities on their Personal Mentoring Plan online as they complete activities to keep the LSBA abreast of their progress. Mentors are not required to record activities.

COMPLETE THE PROGRAM

Mentees will have at least a year for the TIP Mentoring Program to be completed and need to have everything completed by their specific MCLE deadline date. This is their only deadline other than turning in their Mentoring Acknowledgment. After completing program activities, wrapping up the program takes only a few final steps to ensure that the Mentee

MENTEE ATTESTS TO FINISHING ACTIVITIES

Personal Mentoring Plan

As soon as a mentee completes their last required activity, a prompt will appear on the screen letting them know the TIP Program Attestation is available at the top of the screen. Mentees are requested to review all their activities and dates to make sure they are correct. Once they sign and submit their attestation, an email will be sent to their mentor to review the activities. Mentees will be able to see the attestation time and date on their homepage.

MENTEE FILLS OUT EVALUATION

A link for the TIP Program Mentee Evaluation will be available on the mentee's homepage. Mentees are asked to fill it out to submit program feedback, to aid the LSBA in improving the program for future mentees, and to help measure goals and grow the program.

MENTOR REVIEWS ACTIVITIES AND ATTESTS

Mentee Review for Mentors

Mentors will receive a link to review the final activity worksheet. They will have to sign off and attest that their mentee satisfied everything in a timely and complete fashion as the mentee attested. Mentees will be able to see on their homepage that their mentor has signed off on their activities.

COMPLETE THE PROGRAM

Mentees will receive an email confirmation that they have completed their program once their mentor has attested to all their activities being completed. This confirmation will also be available on your Personal Mentoring Plan.

CLE HOURS

LSBA MCLE Requirements

Mentees will receive 12.5 hours of MCLE credit for completing the TIP Program satisfying the CLE requirements under Rule 3(b) for newly admitted active Members and 12.5 MCLE hours satisfying the CLE requirements for the second full calendar year following their admission.

CERTIFICATES

LSBA CLE LSBA Events Calander

The LSBA will send mentees a certificate and a letter in the mail to the member's address of record. Mentees will also receive a $200 TIP Bucks Voucher. This LSBA currency can be applied to any programming offered by the LSBA, i.e., CLE seminars, annual meeting/summer school, etc., but not mandatory fees like dues, assessment, etc. Go here for information on upcoming CLE sessions and other programming. Programming can also be found on the LSBA Event Calendar.

First Meeting Guide

- Mentees should contact their Mentor to set up a meeting as soon as possible after they receive their pairing email.
- The TIP Program prefers the first meeting to be in person to help establish the relationship with face-to-face introductions and interactions, but virtual meetings are allowed.
- If Mentees are unable to contact their Mentor immediately, please do not give up. If they are unable to get in touch with their Mentor after sufficiently attempting, through all available contact information, please get in touch with the LSBA at TIP@lsb.org as soon as possible.

The most important issue at the first meeting, after introductions and some face-to-face discussions, is for Mentees to set up their Personal Mentoring Plan. However, this includes more than choosing which activities they will complete. Mentees and Mentors also need to discuss everything else about how they will complete the program and activities in order to have a successful mentoring relationship, and be able to complete the program in a timely manner.

What should we discuss?

- Personal Mentoring Plan
- Goals
- Schedules
- Timelines
- Communication Style

1. **Personal Mentoring Plan**
    - Mentees must complete all Annual Activities. Discuss how each one will be completed.
    - Mentees can choose specialized courts tailored to a certain area of interest, as well as finding a meeting or function of a group that they might have an interest in joining.
    - Pairs can also discuss how they could choose State or Federal court hearings tailored to different interests as well.
    - Mentees and Mentors should choose which Discussion Activities they think they want to talk about in each Section. Mentees must complete at least 5 in each Section, but they can complete more. The program can also be tailored here as well based on which activities are chosen.
2. **Goals**
    - Mentees should discuss what goals they have for their career.
    - Mentors and Mentees should talk about their goals for the program as well.
    - Pairs should address what they both want to get out their time together.
3. **Schedules**
    - Mentees and Mentors should discuss their individual schedules and what amount of time they have to devote to the program.
    - Pairs can talk about what time of day or time of the week might be best for each of them to meet based on their responsibilities.
    - Mentors and Mentees should discuss if they are available outside of their regular schedule.
4. **Timelines**

- The TIP Program only requires 4 meetings between Mentors and Mentees, but pairings often meet more frequently.
- There is no set timeline to complete activities. The LSBA sets out the requirements but are always very flexible regarding the logistics of completing the activities.
- Mentees and Mentors can follow any schedule or timeline they agree upon and should discuss the timeline of how they will complete activities going forward.
- Pairs should talk about what happens if something comes up to interrupt their agreed upon schedule.

5. **<u>Communication Style</u>**
    - Mentors and Mentees need to talk about how they communicate best.
    - Pairs should discuss which communication methods they are, and are not, available on and when.

<u>TIPS</u>

- Learn what you can about your Mentor or Mentee before your initial meeting.
- Mentees should review the activities before your meeting so that you have an idea of what activities you want to select, and you can discuss them with your Mentor when you arrive.
- Mentors can discuss their own experiences with mentors during their career, or if they lacked mentors, how that affected them.
- Be as specific as possible:
    - Example: Talk about exactly how each Annual Activity will be accomplished, and which person might have to be called on to assist with completing the activity if it is not something that the Mentor or Mentee can accomplish through their job.
    - Example: Mentee says they use their phone the most to communicate (but by text message), or the Mentor says the easiest way to get them is through email.
- Getting everything discussed at the first meeting might seem daunting, but it can save time and effort down the line when expectations have already been set.
- Listen!
- Ask Questions!!

After Mentees and Mentors have gone over the TIP Handbook, discussed how they will handle the program, chosen activities, discussed meeting dates and proposed schedules, filled out their plan, and signed it, that is the Mentee's **<u>Personal Mentoring Plan</u>**. The last page of the Personal Mentoring Plan (the Mentoring Plan Acknowledgment page 24) is what is turned in to TIP@lsba.org. Mentees must send this within 45 days after they are paired.

<u>Creating the Mentee's Personal Mentoring plan</u>

The very first Required Activity—and likely the most important one as discussed above—during the TIP period will be the **Initial Meeting between Mentee and Mentor at the Mentor's office**. Besides simply making basic in-person, face-to-face introductions, the purpose of this first meeting will be to explore the goals, interests, and chosen practice area(s) of the Mentee in order to develop and custom-tailor the Activities listed on the Model Mentoring Plan into an effective and meaningful Personal Mentoring Plan for the Mentee and Mentor.

The Model Mentoring Plan is the blank mentoring plan located on pages 17-24. Once the Mentee and Mentor have reviewed the TIP Handbook, talked about how they will manage the program, decided on individual activities, discussed schedules and meeting dates, completed the Model Mentoring Plan, and signed the Mentoring Acknowledgement, **<u>that is their Personal Mentoring Plan.</u>**

The Mentee and Mentor should each read and consider these Instructions very carefully <u>BEFORE</u> your First Meeting:

1. <u>Print and bring the Model Mentoring Plan</u> to the Initial Meeting at the Mentor's office.

2. The Mentee and Mentor should <u>discuss and explore the New Lawyer's professional goals, interests, chosen practice area</u>(s) and the <u>Louisiana Code of Professionalism</u>.

3. Review and briefly discuss all of the **<u>Required Annual Activities</u>** contained within the Model Mentoring Plan—all 11 of the Required Annual Activities must be included within the Personal Mentoring Plan. Discuss ahead of time how they might be completed. (The Annual Activities can be logistically completed in a variety of ways- in person or virtually. Mentees can complete activities through their jobs or with the help of friends. Mentors can reach out to colleagues or friends to help with activities they do not perform through their jobs. For example: An attorney who does not perform Criminal work can reach out to a Criminal attorney to help their mentee with completing any of the criminal activities.)

4. At least 5 of the **<u>Discussion Activities</u>** listed within the Model Mentoring Plan must be selected **<u>for each Section</u>** and included in and used as part of the Mentee's Personal Mentoring Plan. The Discussion Activities are arranged in order to introduce you to the Legal Profession, but they can be completed in any fashion. Activities listed as "Required" <u>must</u> be included in the 5 Activities for that Section. Your Personal Mentoring Plan must include at least a total of 20 Discussion Activities (5 from each Section) but can always include more.

5. There is a fair amount of flexibility afforded to the Mentee and Mentor with respect to scheduling and completing the Activities. While the Activities are laid out in advance, there is no set schedule that the Activities need to completed on. Mentees and Mentors are free to work out a timeline or activity schedule that best suits their individual needs.

6. Once you have discussed your goals, reviewed the Handbook, selected all activities, discussed schedules, meetings, communication styles, and everything else necessary to have a successful mentoring partnership, both the Mentee and Mentor must sign **<u>the Mentoring Plan Acknowledgment</u>**. It is located on the last page of the Model Mentoring Plan form. This signifies

your agreement to and selection of the Required Annual and Section Activities to be completed as part of your Personal Mentoring Plan, as well as your commitment to your TIP Program, and your appreciation of what the TIP Mentorship Program is an is not about.

7. The Model Mentoring Plan Form, once all selections have been made, and it has been signed by you and your Mentor, is considered to be the **Mentee's Personal Mentoring Plan.**

8. A copy of the signed Mentoring Plan Acknowledgment (page 24) must be submitted to TIP@lsba.org within 45 days of the Mentee's program start date.

Any questions regarding the creation of the Mentee's Personal Mentoring Plan should be directed to the LSBA TIP Coordinator at TIP@lsba.org or (504) 619-0138 or toll free at 1-800-421-LSBA.

MODEL MENTORING PLAN DISCUSSION

As noted above, the Model Mentoring Plan is provided as a template for the Mentor and Mentee to use in preparing/customizing a Personal Mentoring Plan for the Mentee, i.e., the “game plan” that will be followed and referenced by the Mentor and Mentee during the New Lawyer’s TIP period.

Included within this Handbook are resource materials for each of the Activities and Experiences listed within the Model Mentoring Plan, which, in many instances, may include “Worksheets” and/or suggested checklists for added guidance. The worksheets are located at the end of the listed Activity. Clicking on the worksheet link online will take you directly to the resource materials.

Completion of the “Worksheets” is not mandatory, but participants are encouraged to refer to and use them as aids for discussion.

While a minimum of five (5) Discussion Activities must be completed by the Mentee and Mentor in each Section, more Activities may be covered and included in your plan and often are.

The Activities for each Section are organized into categories:

Section One: Serving the Public and Serving the Profession

Section Two: Personal, Professional and Ethical Development

Section Three: Client Relations, Communication and Negotiations

Section Four: Law Office Management

COMPLETION OF THE PERSONAL MENTORING PLAN

Mentees are required to update their Activity progress on their Personal Mentoring Plan online as they complete Activities to keep the LSBA abreast of their progress.

Recording Activities is very simple. When a Mentee opens the Mentoring Homepage there is a link that says *For Mentees*. After clicking on that link, it takes them to the Mentee Homepage where they will see *Existing Mentee Login*. Mentees will need to log into their LSBA account, and it will take them to their Personal TIP Homepage. On that page will be their Personal Mentoring Plan, a place to Update Mentee's Profile, and access TIP Program Resources. Once a Mentee enters their Personal Mentoring Plan and scrolls down, there will be activity tabs: Annual Activities, Section 1, Section 2, etc. They will click the tab for the Activity they have completed, choose the court (if necessary), enter the date the Activity was completed, and click submit as completed. Mentees may record Activities in any order on their online Personal Mentoring Plan, just as they may complete them in any order.

Mentors can see the Mentees' progress on the Mentor Homepage. While Mentees and Mentors do not have to meet more than 4 times, they should be periodically checking in with their Personal Mentoring Plan to make sure everything is on track to be completed in a timely fashion. If a mentee fails to complete their Personal Mentoring Plan by their deadline, neither the Mentee, nor their Mentor, will be eligible for their CLE hours.

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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	**Required**	
2	Attend Criminal Hearing or Trial in State District Court	**Required**	
3	Attend Civil Hearing or Trial in Federal District Court	**Required**	
4	Attend Criminal Hearing or Trial in Federal District Court	**Required**	
5	View Appellate Court Oral Argument (may view on-line Louisiana Supreme Court oral argument)	**Required**	
6	Attend Hearing or Trial in at Least Two (2) Different Specialized Courts **[1st Court]**: [circle court selected] - Bankruptcy Court - State or Federal Administrative Law Court - Family/Domestic/Juvenile Court - Small Claims Court	**Required**	
7	Attend Hearing or Trial in at Least Two (2) Different Specialized Courts **[2nd Court]**: [circle court selected] - Bankruptcy Court - State or Federal Administrative Law Court - Family/Domestic/Juvenile Court - Small Claims Court	**Required**	
8	Attend Deposition (with Mentor)	**Required**	
9	Visit Jail (with Mentor) – to understand procedure(s) for visiting clients in jail [Worksheet 9]	**Required**	
10	Attend at least one (1) Meeting or Function of LSBA, local bar association, specialized bar association, or Inn of Court (with Mentor) [Worksheet 10]	**Required**	
11	Attend LSBA's Bridging the Gap Program	**Required**	

FIRST SECTION: SERVING THE PUBLIC AND SERVING THE PROFESSION

(SELECT AT LEAST FIVE (5) THIS SECTION)

	Discussion Activity	Mentee: Circle 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) [Worksheet 1-2]	**Required**	
2	Mentee & Mentor - During Initial Meeting at Mentor's Office, Develop Mentee's Personal Mentoring Plan [Worksheet 1-2]	**Required**	
3	Mentee & Mentor – During Initial Meeting at Mentor's Office, Discuss Louisiana Code of Professionalism [Worksheet 3]	**Required**	
4	Mentee & Mentor - Discuss "Unwritten" Customary Rules of Civility & Etiquette Among Lawyers & Judges [Worksheet 4]	Option	
5	Mentee & Mentor - Meet at Mentor's Office to be Introduced to Other Members of Mentor's Law Firm [Worksheet 5]	Option	
6	Mentee & Mentor – Review & Discuss Rule 6.2 & Rule 6.3 of the Louisiana Rules of Professional Conduct ("LRPC") [Worksheet 6]	Option	
7	Mentor – Acquaint Mentee with "Legal Aid", Local Pro Bono Agencies & Lawyers Engaging in Civic and/or Charitable Work [Worksheet 7]	Option	
8	Mentee & Mentor – Discuss Work/Life Balance and Factors Affecting Ability to Practice Successfully [Worksheet 8]	Option	
9	Mentee & Mentor – Discuss Annual MCLE Requirements & Ways to Fulfill Same [Worksheet 9]	Option	

SECOND SECTION: PERSONAL, PROFESSIONAL AND ETHICAL DEVELOPMENT

(SELECT AT LEAST FIVE (5) THIS SECTION)

	DISCUSSION ACTIVITY	MENTEE: CIRCLE 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 [Worksheet 1]	Option	
2	Mentee & Mentor – Discuss Lawyer-Related Substance Abuse & Mental Health Issues: Warning Signs; Colleagues With Problems; Resources (LSBA Lawyers Assistance Program ("LAP")) [Worksheet 2]	**Required**	
3	Mentee & Mentor – Discuss Career Paths & Identify Resources for Exploring Options, Including Discussing Differences in Working in Firms of Various Sizes & in Government [Worksheet 3]	Option	
4	Mentee & Mentor - Discuss Managing Law School Debt [Worksheet 4]	Option	
5	Mentee & Mentor – Discuss Job Search Strategies [Worksheet 5]	Option	
6	Mentee & Mentor – Discuss Common Malpractice Traps & How To Avoid Them [Worksheet 6]	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" [Worksheet 7]	Option	
8	Mentee & Mentor – Discuss Purpose(s), Importance & Benefits of Prof. Liability Insurance [Worksheet 8]	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") [Worksheet 9]	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 [Worksheet 10]	Option	

THIRD SECTION: CLIENT RELATIONS, COMMUNICATION AND NEGOTIATIONS

(SELECT AT LEAST FIVE (5) THIS SECTION)

	DISCUSSION ACTIVITY	MENTEE: CIRCLE EACH ITEM TO BE COMPLETED	MENTEE: INITIAL & DATE WHEN COMPLETED
1	Mentee & Mentor - Discuss Client & Business Development, Retention of Clients & Related Ethics Issues [Worksheet 1]	Option	
2	Mentee & Mentor – Discuss Client Role in Decision-Making Process (incl. Rule 1.2 of the “LRPC”) [Worksheet 2]	Option	
3	Mentee & Mentor – Discuss How to Evaluate a Potential New Case & Whether to Accept a New Case [Worksheet 3]	Option	
4	Mentee & Mentor - Discuss Dealing with “Di0fficult” Client(s) [Worksheet 4]	Option	
5	Mentee & Mentor – Discuss Importance of Good Communication with Client, Providing Updates, Status Reports, Etc. (incl. Rule 1.4 of the “LRPC”) [Worksheet 5]	Option	
6	Mentee & Mentor – Discuss Setting Fees, Fee Arrangements & Fee Agreements [Worksheet 6]	Option	
7	Mentee & Mentor – Discuss Techniques for Legal Counseling & Advising Clients [Worksheet 7]	Option	
8	Mentee & Mentor – Discuss Appropriate Ways for Dealing With Others on Behalf of Clients (incl. ethics, professionalism, custom, etiquette, etc.) [Worksheet 8]	Option	
9	Mentee & Mentor – Discuss Preparation for Taking & Defending Depositions [Worksheet 9]	Option	
10	Mentee & Mentor – Discuss Methods & Issues in Negotiations [Worksheet 10]	Option	
11	Mentee & Mentor – Discuss Effective Legal Writing [Worksheet 11]	Option	
12	Mentee & Mentor – Discuss Alternative Dispute Resolution (“ADR”) [Worksheet 12]	Option	

FOURTH SECTION: LAW OFFICE MANAGEMENT

(SELECT AT LEAST FIVE (5) THIS SECTION)

	DISCUSSION ACTIVITY	MENTEE: CIRCLE 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 [Worksheet 1]	Option	
2	Mentee & Mentor – Discuss Checking for/ Recognize Conflicts of Interest [Worksheet 2]	Option	
3	Mentee & Mentor – Discuss Roles of Secretaries, Legal Assistants, Paralegals, Law Clerks, etc. (Rule 5.3 of the "LRPC") [Worksheet 3]	Option	
4	Mentee & Mentor - Discuss Unauthorized Practice of Law & Prevention of Same (R.S. 37: 213 & Rule 5.5 of the "LRPC") [Worksheet 4]	Option	
5	Mentee & Mentor – Discuss "Office Politics", Including What is & What is not Appropriate Networking, Socializing & Personal Behavior(s) [Worksheet 5]	Option	
6	Mentee & Mentor – Discuss Issues & Steps for Leaving a Law Firm [Worksheet 6]	Option	
7	Mentee & Mentor – Discuss Good Time Management Skills/Techniques [Worksheet 7]	Option	
8	Mentee & Mentor – Discuss Law Office Management Matters, such as: [Worksheet 8] - Time Records - Records of Client Expenses - Billing Systems - Advance Deposits/Payment Schedules - Trust Accounting, incl. IOLTA & Handling Client Funds - Filing System(s) & Procedures - Document/File Retention - Calendar Reminder, Docket & Case Management Systems - Information Technology Systems, incl. On-line Court Systems such as PACER - Library & Legal Research System(s)	Option	

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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

<u>CERTIFYING COMPLETION</u>

<u>How much time?</u>

Mentees will have at least a year to complete the TIP Mentoring Program and need to have everything completed by their specific MCLE deadline date. This is their only deadline other than turning in their Mentoring Acknowledgment.

<u>How to attest?</u>

As soon as a mentee completes their last required activity online, they are required to review all their Activities and dates to make sure they are correct. Once they sign and submit their attestation online, an email will be sent to their Mentor to review the Activities. Mentees will be able to see their attestation time and date on their Personal TIP homepage.

<u>Where is my evaluation?</u>

A link for the TIP Program Mentee Evaluation will be available on the mentee's homepage. Mentees are asked to fill it out to submit program feedback, to aid the LSBA in improving the program for future mentees, and to help measure goals and grow the program.

<u>Am I finished?</u>

Once a Mentee signs off on their attestation, Mentors will receive a link to review the final Activity worksheet. They will have to sign off and attest that their mentee satisfied everything in a timely and complete fashion as the Mentee attested. Mentees will be able to see on their homepage that their Mentor has signed off on their Activities. Mentees will receive an email confirmation that they have completed their program once their Mentor has attested to all their activities being completed. This confirmation will also be available on your Personal Mentoring Plan.

<u>What will I receive?</u>

Mentees will <u>receive 12.5 hours of MCLE credit for completing the TIP Program</u> satisfying the CLE requirements under Rule 3(b) for newly admitted active Members and <u>12.5 MCLE hours satisfying the CLE requirements for the second full calendar year</u> following their admission.

The LSBA will send Mentees a <u>certificate and a letter</u> in the mail to the member's address of record. Mentees will also receive a <u>$200 TIP Bucks Voucher</u>. This LSBA currency can be applied to any programming offered by the LSBA, i.e., CLE seminars, annual meeting/summer school, etc., but not mandatory fees like dues, assessment, etc. Go here for information on upcoming CLE sessions and other programming. Programming can also be found on the LSBA Event Calendar.

Mentees are also now eligible for SPOT Mentoring Program. The program allows eligible LSBA attorneys to initiate contact with a Spot Mentor on questions a lawyer 2-7 out in practice may encounter. We have a database of over 700 Mentors working in a wide range of fields to answer questions. The program allows young lawyers to seek advice, guidance, or information from Mentors by posting questions in a secure email format on the LSBA website. All Spot Mentors will receive the inquiry. There is no need to register, Mentees are automatically eligible based on years in practice. This innovative program is a great resource and aid to you. Other young attorneys who have utilized the program have found it to be very beneficial and have aways gotten a wealth of valuable advice from our database of mentors.