NLMP
MENTORING PLAN
CURRICULUM & CHECKLIST

Set forth below is the curriculum for the New Lawyer Mentoring Program. The following checklist includes the REQUIRED elements for each component, followed by suggested OPTIONAL activities and/or experiences that may enhance the mentoring relationship.

PART A:

1. Introduction to the Legal Community, Public Service and Bar Service
2. Rules of Professional Conduct / Standards of Professionalism
3. Introduction to Law Office Management
4. Working with Clients
5. Career Satisfaction and Work/Life Balance

PART B:

6. Required Practice Area Activities

Mentors and new lawyers are encouraged to be broad, expansive and creative in how they address each of the six components.

The mentor need not directly lead each and every experience outlined. The mentor assumes the role of "primary care practitioner" in assuring that the new lawyer gains access to the people and professionals that will support the new lawyer's career goals, and reinforce development of a professional, ethical and competent law practice. Quite frequently, new lawyers may get more value out of exploring key concepts with someone more directly involved or knowledgeable about that area. For example, in a large firm, understanding of billing practices or trust account management may be handled by the accounting department, with the mentor simply confirming that the curriculum element was addressed.

New lawyers are encouraged to retain a copy of the mentoring plan checklist in the event of an MCLE audit.

Please feel free to contact the NLMP with recommendations for further activity content.

New Lawyer _____ **Mentor** _____

PART A: REQUIRED & OPTIONAL ACTIVITIES/EXPERIENCES

1. Introduction to the Legal Community, Public Service and Bar Service

Required Activities	**Date completed**
• As soon as practicable after receipt of the mentoring match, the new lawyer and mentor meet to get acquainted and design the mentoring plan. **The new lawyer is responsible for arranging the initial meeting.**	
• Introduce the new lawyer to other lawyers in the community through attendance at meetings of the local bar association or another law-related group. Discuss opportunities for participating in the work of local, state or national bar organizations and the value of professional networking and relationships gained thereby.	
• Describe and explain the customs and expectations of etiquette and behavior in the legal community such as cooperating with reasonable requests of opposing counsel that do not prejudice the rights of the lawyer's client, punctuality in fulfilling all professional commitments, avoiding offensive tactics, treating opposing parties and counsel with courtesy, and discuss the value of adhering to those customs and practices.	

***Optional* Activities**	**Date completed**
• Introduce the new lawyer to other lawyers and staff members at the mentor's office or workplace, or ascertain that such introductions have already occurred.	
• Discuss a lawyer's professional obligations regarding and the personal rewards arising from community and public service, and supporting and providing legal service to low income clients. Acquaint the new lawyer with Campaign for Equal Justice, the Oregon Law Foundation and/or other law-related charitable organizations. Acquaint the new lawyer with programs in which lawyers in private practice can provide pro bono legal services.	
• Review and discuss the opportunities for volunteer participation in OSB and local bar programs (including the ONLD and local bar young lawyer groups) and how being involved in such activities promotes professional and personal development.	
• Escort the new lawyer on a tour of the local courthouse(s) and, to the extent practicable, introduce the new lawyer to members of the judiciary, court personnel and clerks of court.	

2. Rules of Professional Conduct / Standards of Professionalism

Required Activities	**Date completed**
• Review and discuss ethical issues that arise with some regularity in the practice setting and best practices for resolving them, with reference to experience as well as the Rules of Professional Conduct. Review and discuss the importance of and methods used to screen for conflicts. Discuss available resources for resolving ethical issues, including consultation with the OSB ethics advice service, private ethics counsel and in-house ethics counsel or committees.	
• Review and discuss the OSB Statement on Professionalism.	
• Discuss the importance of cultural competence to effectively represent diverse clients and work in a diverse legal community.	

***Optional* Activities**	**Date completed**
• Discuss the lawyer's oath and the practical application of the obligation to protect the laws of the State of Oregon and the United States.	
• Discuss the core lawyering values of confidentiality and loyalty with reference to the Oregon Rules of Professional Conduct. Some ORPC's that could be emphasized include: • 1.7 thru 1.11 Conflicts of Interest; • 3.3. Candor Toward the Tribunal; • 4.2 Communication with Persons Represented by Counsel; or • 4.3 Dealing with Unrepresented Persons	
• Discuss how a new lawyer should handle a situation in which it is believed that another lawyer has violated ethical duties, including the duty to report certain kinds of misconduct. Discuss what to do if the new lawyer believes they have been instructed to engage in prohibited conduct.	
• Discuss and explain the Minimum Continuing Legal Education requirements and ways to fulfill such requirements, including OSB programs.	

3. Introduction to Law Office Management

Required Activities	**Date completed**
• Discuss the ethics rule most frequently invoked by the OSB – neglect of a legal matter and failure to communicate with client – and the role of good time keeping, time management and communication techniques. Introduce calendar and "tickler" or reminder systems.	
• Review and discuss malpractice insurance coverage including disclosure requirements.	

***Optional* Activities**	**Date completed**
• If the new lawyer and the mentor are in the same firm, discuss the new lawyer's role in the billing system. If not in the same firm, review and discuss good billing practices, or arrange for new lawyer to meet with someone knowledgeable about best practices.	
• Review and discuss trust account rules and best practices for handling of client funds, including importance of clearing checks before funds are drawn and authority needed to pay lawyer fees from client funds in trust. Review and discuss OSB and PLF resources.	
• Introduce the use of information technology systems in law practice.	
• Discuss resources (publications, seminars, research tools, equipment, etc.) that a new lawyer might find particularly helpful in their work.	
• Discuss the roles and responsibilities of paralegals, secretaries and other office personnel, and how to honor and establish good working relationships with others in the office who are support staff, colleagues or senior partners.	
• Review and discuss a lawyer's responsibility as a subordinate under RPC 5.2, and as a supervisor of non-lawyers under RPC 5.3.	

4. Working with Clients

Required Activities	**Date completed**
• Review how to screen for, recognize and avoid conflicts of interest.	
• Discuss "DOs and DON'Ts" of maintaining good ongoing client relations, such as returning telephone calls and keeping clients informed about matters.	

***Optional* Activities**	**Date completed**
• Discuss the importance of knowing whom you represent, particularly when representing corporations, government agencies or other organizations.	
• Discuss client interaction, including tips for gathering information about a legal matter and appraising the credibility and trust of a potential client.	
• Discuss issues that arise regarding the scope of representation.	
• Participate in or observe at least one client interview or client counseling session.	
• Discuss how to decide whether to accept a proffered representation.	
• Discuss how to talk about and set the fee for legal services. Review retainers and fee agreements and discuss the importance of written engagement agreements.	
• Discuss how to deal with a difficult client and how to decline representation of the unrealistic or "impossible" client.	
• Discuss terminating the lawyer-client relationship and necessary documentation.	

5. Career Satisfaction and Work/Life Balance

Required Activities	**Date completed**
• Discuss how to handle challenging relationships in and outside the office, and how to develop a support system of colleagues and others with whom the new lawyer can discuss problems as they arise.	
• Discuss the warning signs of substance abuse and depression and how to address those problems when they are manifested in the new lawyer or others. Review and discuss the support and counseling available to the new lawyer and their family through the Oregon Attorney's Assistance Program. Review OSB and PLF resources.	

***Optional* Activities**	**Date completed**
• Discuss the importance of having a business plan for developing a practice and meeting both short- and long-term career objectives.	
• Discuss the importance of making time for family, friends and other personal interests. Discuss how to manage billable hour or other performance requirements to enable an appropriate balance of professional obligations and personal life.	

PART B: REQUIRED PRACTICE AREA ACTIVITIES

Select and complete **at least ten (10)** Practice Area Activities in one or more substantive law practice areas. Suggestions for these activities can be found on the NLMP Practical Skills Activities page.

At least one of the activities must be a writing project that the mentor reviews with the new lawyer.

Practice Area Activity	Date completed
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

FINAL STEP: NEW LAWYER REPORTING COMPLETION

When you have completed the mentoring plan curriculum, please log in to your OSB member account and:

1. report the activity on your MCLE transcript;
2. upload the signed completion certificate; and
3. pay the fee, if applicable.

The NLMP credits (6 general) will appear on your first three-year reporting transcript.

Upon receipt of your completion certificate, NLMP staff will add the applicable credits to your mentor's current MCLE transcript.