**Mentoring Plan For Underrepresented Lawyers**

1. **Initial Planning, Meeting, Personal and Professionalism Development**

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| Action | Mark completed items |
| Meet in person (where practical) or virtually to prepare the customized mentoring plan based on Mentee’s needs and interests. Utilize the CAMP [Initial Goal Plan & Meeting Guide](http://coloradomentoring.org/wp-content/uploads/2018/06/Initial-Meeting-Guide-Goal-Plan-June-2018.pdf) to assist your Mentoring pair in developing goals for the Mentoring relationship. |  |
| Discuss best communication methods for each participant, and consider scheduling all remaining meetings/activities for the Mentoring term. |  |
| In tailoring the Mentoring plan to Mentee’s interests, discuss long-term professional and career goals and identify ways to achieve them. |  |
| Mentor should introduce Mentee to their office’s attorneys and staff (if not already done) if practical. |  |
| Include in the meeting a day-in-the-life discussion, including discussion about work-life integration, mental health and substance abuse issues facing lawyers, and the services available to attorneys regarding these health issues. |  |
| Focus on building rapport with your mentoring partner through the following steps:   1. Shift Your Mindset to “I Am Worthy of Mentoring” 2. Look for Indicators of Shared Humanity With Your Mentoring Partner 3. Identify One Thing You Can Appreciate About Your Mentoring Partner 4. Listen to Understand 5. Be Open…Not Transactional |  |

1. **The Colorado Bar and Legal Community**

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| Action | Mark completed items |
| **Complete at least one of the following:** |  |
| Attend a meeting of an organized bar association or other attorney networking event together, including an affinity bar association, either in person or virtually. Introduce Mentee to other attorneys in attendance. Discuss the advantages of bar association involvement and discuss the many local, state, and national associations available, including any in Mentees specific practice area or affinity bar association that meets Mentee’s individual needs.   * [CBA’s Specialty and Diversity Bar Associations](https://www.cobar.org/Local-Bar-Associations/Specialty-and-Diversity-Bar-Associations) |  |
| Meet at the local courthouse(s), particularly the one in which Mentee may be appearing, and make introductions to members of the judiciary, court personnel, and clerks of court. Discuss customary rules of civility or etiquette in court and among lawyers and judges in the community. |  |
| Attend a Term Day (or similar activity) which involves a gathering of judges and attorneys of the local bar. |  |

1. **Developing Professional Identity & Lawyer Well-Being**

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| Action | Mark completed items |
| **Complete at least two of the following:** |  |
| It is envisioned that this component of the mentoring plan should be creatively tailored for the individual mentee’s needs. The discussion should focus on understanding “why” Mentee chose the profession of law and what Mentee seeks to accomplish in their professional role.   * How does Mentee define “professional success” and whose input/feedback did they utilize in developing this definition? * What characteristics, skills, and attributes does Mentee have that will allow them to find professional success? * Who are the people in Mentee’s personal and professional community who will support them in finding professional success?   Assist Mentee in articulating their “Professional Identity” as a lawyer. Utilize John Bliss’ [The Professional Identity Formation of Lawyers](https://www.youtube.com/watch?v=afPxGz51Sy0) to assist your mentoring pair in facilitating this discussion. |  |
| Engage Mentee in a self-reflective exercise to determine whether Mentee believes they are thriving in all dimensions of “well-being” including:  **Emotional:** Recognizing the importance of emotions; developing the ability to identify and manage our own emotions to support mental health, achieve goals, and inform decision making; seeking help for mental health when needed.  **Occupational:** Cultivating personal satisfaction, growth, and enrichment in work; financial stability.  **Intellectual:** Engaging in continuous learning and the pursuit of creative or intellectually challenging activities that foster ongoing development, monitoring cognitive wellness.    **Spiritual:** Developing a sense of meaningfulness and purpose in all aspects of life.  **Social:** Developing a sense of connection, belonging, and a well-developed support network while also contributing to our groups and communities.  **Physical:** Striving for regular physical activity, proper diet and nutrition, sufficient sleep, and recovery; minimizing the use of addictive substances; seeking help for physical health when needed.  Assist Mentee in developing well-being objectives and a plan to address Mentee’s self-identified deficiencies in these dimensions of well-being. Consider the [ABA Well-Being Toolkit for Lawyers and Legal Employers](https://www.americanbar.org/content/dam/aba/administrative/lawyer_assistance/ls_colap_well-being_toolkit_for_lawyers_legal_employers.authcheckdam.pdf) in building a well-being action plan. |  |
| Engage Mentee in a reflective exercise regarding resilience. How does Mentee assess their own resiliency? What factors account for Mentee’s measurement of resilience? Assist Mentee in developing a plan to improve their resiliency. Consider the following resources:   * [Three Ways Lawyers Can Become More Resilient](https://abovethelaw.com/2016/02/3-ways-lawyers-can-become-more-resilient/) * [Survival Skill No. 1 for Lawyers: Emotional Resilience](https://www.attorneyatwork.com/survival-skill-no-1-for-lawyers-emotional-resilience/) |  |
| **Defining Professional & Personal “Success”**  Work with Mentee to create a sustainable and fulfilling definition of professional and personal success for themselves. To assist in this discussion, follow the steps below:  **Traditional Concepts of Success**  Defining success may seem easy at first. When asked to define success, most people cite conventional ideas of success, such as achieving independence, attaining a position of power, or amassing wealth. Pop culture is filled with characters who have achieved one of these traditional goals for success, but who are unsatisfied with it, from Ebenezer Scrooge to Charles Foster Kane. These are hyperbolic illustrations, but they serve a valuable lesson about the illogical appeal of wealth and power. They're alluring goals, but they are often not actually what make people feel happy and fulfilled. It's impossible to set good goals unless you know which ones are going to truly make you happy. Figuring out what's truly important to you and filtering out the influence of traditional concepts of success, is the first step to creating a goal structure and ultimately forging a path to that success.  **Unconventional Definitions of Success**  History is ripe with individuals who have earned great respect because they followed an unconventional path, usually inspired by an unconventional definition of success. To many of these entrepreneurs and mavericks, that level of respect doesn't matter because they've found ultimate satisfaction in the work they do on a regular basis.  **Finding Your Definition of Success**  You may find it difficult to define your version of success and, if you do, you aren't alone. Figuring out what your definition of success is early on is the best way to create goals that will result in true satisfaction—not just money or power.  Picture yourself with all the money and time you could ever want. What would you do? Would you help promote a specific cause? Would you pursue a certain hobby or try to solve a major problem in the world? How would you find satisfaction? If you can answer these questions, you may have just found your definition of success. If not, look outward for inspiration. Speak with your mentors to get their insights on what success is and what's most important in their lives.  **A Foundation for All Your Goals**  Once you've figured out what success means to you, you can build the rest of your goals from there. Usually, you'll have two or three primary goals that allow you to achieve your definition of success, each of those goals will have several smaller goals it depends on, and so on.  The key to staying motivated in the face of adversity or unanticipated challenges is contextualizing those shortcomings. Your definition of success also dictates your definition of failure—you’ve only failed if you've given up on achieving success. |  |
| **Assessment Of Current Professional Identity**  Ask Mentee to answer the question “what do you do” to initiate the conversation about professional identity. Work with Mentee to expand the answer to the question to include a broader definition of Mentee’s strengths, interests, and professional passions. |  |

1. **Building a Professional Network**

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| Action | Mark completed items |
| Discuss how to develop networks early in Mentee’s career. Find points of entry to target, and discuss the importance of how building a network can help underrepresented attorneys become “stars” at work. |  |
| Facilitate a discussion with other underrepresented attorneys to share successes and challenges in their professional community building pursuits. |  |
| Read The ABA’s article, [The Value of Networking for Diverse Attorneys](https://coloradomentoring.org/wp-content/uploads/2023/01/The-Value-of-Networking-for-Diverse-Attorneys.pdf), and discuss the importance of having a diverse network as both a new and seasoned attorney. |  |
| Discuss the value of “Sponsorship” in career progression for underrepresented lawyers and how to identify and utilize a sponsor to achieve professional growth. |  |
| Discuss the importance of developing group-specific networks outside of a place of employment.   * Explore affinity organizations. * Explore non-affinity organizations. |  |

1. **Colorado Rules of Professional Conduct, Professionalism, and Civility**

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| Action | Mark completed items |
| **Required**  **(to be completed with an activity elected from list below)** |  |
| The pair should discuss the distinction between the Colorado RPC and professionalism; the attorney’s obligations to the court, the client, and opposing counsel; common ethical issues and resources for how to resolve difficult ethical questions; common grievance and malpractice “traps” and how to avoid them; the benefits of carrying malpractice insurance and the ramifications for failing to do so. |  |
| Engage Mentee in a reflection on “bullying” and “toxicity” in the legal profession. Define what these terms mean to Mentee and reflect on whether Mentee has experienced these issues or has contributed to these issues at various points in their legal career. Develop with Mentee a personal plan for avoiding and responding to bullying or toxic behavior. Consider the following resource:   * [Dealing with Lawyer Bullies](https://coloradomentoring.org/wp-content/uploads/2022/01/I’m-a-Lawyer-Not-a-Fighter_-Conquering-Lawyer-Bullies.pdf) |  |
| **Complete at least two of the following:** |  |
| Work with Mentee to develop communication and leadership skills necessary to establish professional working relationships with support staff, associates, and partners. Consider the following resources in your discussion:   * [Fire & Ice: An Associate’s View of Partners](http://coloradomentoring.org/wp-content/uploads/2013/09/Mamounas-J-Fire-and-Ice-An-Associates-View-of-Partners-Litigation-2013.pdf) * [I Don’t Feel Your Pain: A Partner’s View of Associates](http://coloradomentoring.org/wp-content/uploads/2013/09/I-dont-feel-your-pain.pdf) * [Six Ways to Work Successfully With Support Staf](https://coloradomentoring.org/wp-content/uploads/2022/01/How-to-Build-Successful-Work-Relationships-with-Paralegals-and-Assistants.pdf)f |  |
| Discuss appropriate ways to handle situations where a lawyer believes another lawyer has committed an ethical violation or otherwise acted unprofessionally or uncivilly; the obligation to report misconduct; and the appropriate way to handle a situation where Mentee is asked by a senior member of the firm/organization to do something that is unethical or unprofessional. |  |
| Discuss the importance of feedback and advice.   * For a variety of reasons, underrepresented attorneys don’t get the same level of feedback that their (white) male counterparts may get. The quantity and quality of feedback an attorney receives on their work can have a substantial impact on career advancement and success. * Discuss how to ask for critical feedback and learn how to accept and act on criticism appropriately. * Explore the [ABA's Grit Project](https://www.americanbar.org/groups/diversity/women/initiatives_awards/grit-project/). The Grit Project and its tools are designed to enhance the effectiveness, retention, and promotion of women lawyers. * Read and discuss [“Pulling for Feedback the Right Way.”](https://www.2civility.org/pulling-feedback-right-way/) * Read and discuss [“Stop Asking for Feedback. There is a Better Way.”](https://www.2civility.org/stop-asking-for-feedback-theres-a-better-way/) |  |
| Have coffee with opposing counsel to practice discussing different points of view and objectives of both sides. |  |
| Discuss the benefits of the Colorado Bar Association Ethics Hotline.  *Certain members of the Colorado Bar Association Ethics Committee are available for BRIEF discussion of attorneys' own immediate ethical dilemmas or questions. Attorneys are asked to do their own research prior to calling the Hotline. Hotline inquiries are handled by individual members of the Committee to help identify ethical issues and do not necessarily reflect the thinking of the Committee as a whole. To contact the Hotline call the Colorado Bar Association office at 303.860.1115, or 800.332.6736 (in-state only).* |  |

**6. Developing a Competent Practice**

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| Action | Mark completed items |
| Evaluate how Mentee assess their legal competencies. As an outcome to this discussion, Mentee might develop an analysis of practice areas, matter types, client types, and Colorado judicial districts in which they feel “competent” to practice law. Create a plan for Mentee to routinely visit and update this “Zones of Competency” analysis. |  |
| Highlight areas where Mentee may not feel competent today, but wishes to improve competency over time. Generate a long term plan for Mentee to obtain necessary competencies in these areas of interest. |  |
| Assist Mentee in developing a short-term “Competency Plan” in the event that Mentee is approached to take on a matter or client outside of their scope of Zone of Competency. Included in this plan should be the educational resources, mentors, co-counselors, etc. Mentee can access to timely acquire the competency required. |  |
| Discuss the advantages of bar association involvement and discuss the many local, state, and national associations available, including any in Mentee’s specific practice area, as a means to develop referral relationships and networks. |  |
| Add Other |  |
| Add Other |  |

**7. Professionalism in Working With Clients**

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| Action | Mark Completed Items |
| **Complete at least three of the following:** |  |
| Review the [Colorado Principles of Professionalism](https://www.cobar.org/For-Members/Committees/Professionalism-Coordinating-Council/Principles-of-Professionalism) and discuss the ways in which bias may be incorporated into professionalism standards. Discuss whether professionalism standards discriminate against underrepresented identities or force assimilation of underrepresented lawyers. |  |
| Discuss the initial meeting and interaction with a potential client, tips for gathering information about a legal matter, appraising the credibility and trust of the potential client, evaluating whether to accept the representation, how to decline representation. Specifically discuss how to incorporate cultural empathy practices into client communication. |  |
| Discuss importance of client communication and strategies to maintain appropriate ongoing communication (returning telephone calls, email, etc.) to keep clients informed, including use of fee agreements, timeliness, written communication, etc. Evaluate any policies adopted by Mentee’s organization or discuss the benefits of adopting a formal communication policy. |  |
| Discuss proper legal counseling, including the duties and responsibilities of advising clients and the respective responsibilities of the client and the lawyer in decision-making. |  |
| Assess best practices for communicating with clients regarding the business aspects of the relationship, including billing and other business procedures. Evaluate Mentee’s collections policies and communication mechanisms related to those policies. |  |
| Discuss proper legal counseling, including the duties and responsibilities of advising clients and the respective responsibilities of the client and the lawyer in decision-making.   * Consider the following resources in your discussion:   + [Do You Have a Client Centered Law Practice?, Sullivan, 2016](https://blogs.findlaw.com/strategist/2016/11/do-you-have-a-client-centered-law-practice.html)   + [Who is My Client? Client Centered Lawyering With Multiple Clients, Lawton, 2015](http://www.law.nyu.edu/sites/default/files/upload_documents/Julie%20Lawton%20-%20Client-Centered%20Lawyering%20with%20Multiple%20Clients.pdf) |  |
| Discuss how to deal with a “difficult” client. Include in this discussion tools for evaluating when it is time to withdraw from representation, avoid ethical pitfalls, and professionally and responsibly terminate a client relationship.   * [Taming the Beast, How to Manage Difficult Clients, Lowentheil, 2017](https://abovethelaw.com/career-files/taming-the-beast-how-to-manage-difficult-clients/) |  |
| Discuss the termination of the attorney-client relationship, issues with terminating mid-representation, necessary steps and documentation. |  |
| Discuss maintaining communication with client concerning updates in the law, articles, and check-ins if the matter is still live. |  |
| Discuss terminating representation. See RPC 1.16. Discuss rules and procedure for withdrawal specific to the area of practice. |  |
| Discuss the idea that clients are the best marketing for a law firm. Good representation goes a long way. |  |
| Discuss how to handle mistakes made in representation. |  |

**8. Public Service**

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| Action | Mark completed items |
| **Complete at least one of the following:** |  |
| Acquaint Mentee with legal aid programs, local pro bono programs, volunteer boards, and other opportunities for engaging in pro bono activities and civic and charitable work. Discuss the reasons for making time to engage in volunteer legal service to the public and any impediments to undertaking such work. |  |
| Mentee attends a civic club of which Mentor is a member or some other community service activity in which Mentor participates. Discuss the reasons for making time to engage in volunteer legal service to the public. |  |
| The pair participates in a bar-sponsored or other volunteer program aimed at delivering legal services to the public. Discuss the reasons for making time to engage in volunteer legal service to the public. |  |
| The pair uses the [Succession to Service](https://app.joinpaladin.com/succession-to-service/) platform to find a pro bono opportunity relevant to Mentee’s practice of law. Discuss the reasons for making time to engage in volunteer legal service to the public. |  |

**9. Diversity, Equity, Inclusion, and Accessibility**

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| Action | Mark completed items |
| Discuss what diversity, equity, inclusion, and accessibility mean to both Mentee and Mentor and how these concepts manifest in the legal profession. This exercise is designed to create a safe space for conversation and the sharing of different perspectives on how the legal profession is incorporating these concepts and how it can continue to improve. Describe what an ideal practice and legal profession would look like based on these concepts. |  |
| Discuss the dimensions of identity for the Mentor and Mentee. Which identities are most salient for each person? Why? How have these identities served you in the legal profession? How have these identities led to challenge or limitation in the legal profession? |  |
| Discuss roadblocks and challenges the Mentee and Mentor may have experienced because of their underrepresented identities. What methods were taken to address these challenges? What resources were helpful? If there were any resources that would have been helpful but were not available, discuss what those are and how to best implement them in the future. |  |
| Engage one another in a reflective exercise to assess cultural empathy. Use the [Cultural Competence Self-Assessment Checklist](https://www.avma.org/sites/default/files/2020-08/Diversity-CulturalCompetenceChecklist.pdf) as a guide in your discussion. Discuss the ways in which cultural empathy are important to the practice of law and the building of community within the legal profession. |  |
| Attend a diversity awareness or training workshop or CLE together. Discuss the takeaways and next steps in applying what each participant learned.   * [CBA-CLE Equity/Diversity & Inclusion courses](https://cle.cobar.org/Practice-Area/Equity-Diversity-and-Inclusion) |  |
| Discuss various career paths such as Big Law, small firm, government, corporate, legal aid, and nontraditional legal positions and how they related to the Mentee’s personal and professional identities and professional goals.   1. Examine resources for underrepresented attorneys in the organizations or companies appropriate to Mentee’s career path. 2. Discuss how these paths might influence or support Mentee’s professional identity and goals. |  |

## Resources

## Videos

* + - [Reimagining Law: DEI in the Legal Profession – What’s Working and What Isn’t](https://www.2civility.org/reimagining-law-dei-in-the-legal-profession/)
    - [Reimagining Law: Systemic Racism in the Legal Profession](https://www.2civility.org/reimagining-law-judge-ann-claire-williams-ret/)
    - [Reimagining Law: Supporting LGBTQ Legal Professionals](https://www.2civility.org/reimagining-law-moses-suarez-president-of-lagbac-chicagos-lgbtq-bar-association/)
    - [Reimagining Law: Creating a Sense of “Belonging” in the Legal Profession](https://www.2civility.org/reimagining-law-create-a-sense-of-belonging-in-the-legal-profession/)
    - [Reimagining Law: How Lawyers Can Combat Discriminatory Behavior](https://www.2civility.org/reimagining-law-how-lawyers-can-combat-discriminatory-behavior/)

**Articles**

* + - Commission’s most recent [DEI news and articles](https://www.2civility.org/news-updates/?_topics=diversity)
    - [Implicit Bias: Cloaked in Color-Blind Clothing](https://www.2civility.org/implicit-bias-color-blind-clothing/)
    - [Addressing Diversity Challenges in Law Firms](https://www.2civility.org/addressing-diversity-challenges-in-law-firms/)
    - [What Kids Can Teach Lawyers About Diversity and Representation](https://www.2civility.org/minorities-representation-legal-profession/)
    - [5 Things to Know About Lawyers with Disabilities](https://www.2civility.org/5-things-about-lawyers-with-disabilities/)
    - [3 Ways Lawyers Can Promote DEI and More with the CBA Racial Justice Coalition](https://www.2civility.org/3-ways-lawyers-can-promote-dei-and-more-with-the-cba-racial-justice-coalition/)
    - [Inclusive Language is Allyship](https://www.2civility.org/inclusive-language-is-allyship/)
    - [Unconscious Bias in Mentoring Relationships](https://www.2civility.org/unconscious-bias-in-mentoring-relationships/)
    - [Four Reasons You Need a Mentor](https://www.2civility.org/four-reasons-for-mentoring/)

**American Bar Association**

* + - [Bias Interrupters Project](https://www.americanbar.org/groups/diversity/women/initiatives_awards/bias-interrupters/) - You Can't Change What You Can't See: Interrupting Racial and Gender Bias in the Legal Profession
    - [Model Diversity Survey](https://www.americanbar.org/content/dam/aba/administrative/racial_ethnic_diversity/aba/credp_2020_mds_report.pdf) from the Commission on Racial and Ethnic Diversity in the Profession
    - [Implicit Bias Videos and Toolkit](https://www.americanbar.org/groups/diversity/resources/implicit-bias/) from the ABA Diversity and Inclusion Center

**The Institute for Inclusion in the Legal Profession (IILP)**

* + - [Where We Stand: Real Change. Now.](https://theiilp.wildapricot.org/)

1. **Integration and Development of “Whole-Person Lawyering”**

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| Action | Mark completed items |
| **Complete at least two of the following:** |  |
| This component of the Mentoring Plan addresses the unique contribution of the mentee to the legal profession while working with the mentor to shape an approach that expresses the whole person as a lawyer. The discussion should focus on how the unique interests, history, and talents of the mentee influence the mentee’s perspective and how this perspective affects their practice of law. Suggested discussion topics are below: |  |
| * What are your values and how do these fit with your choice to become an attorney? How is this expressed in your practice? |  |
| * Do you have a spiritual context, such as a particular religion, nature or the outdoors, or philosophy? How does this impact why and how you practice law? |  |
| * What are your hobbies and how do they connect with your professional life? Do you use them to offset stress? Do your hobbies directly relate to your practice? How do your hobbies reflect why and how you practice law? |  |
| * What are your talents that express the most essential parts of your personal identity? Do you feel like you are fully expressing all the components of your perspective and experience in life? How do you think doing so would affect why and how you practice law? |  |
| * What are the key relationships in your life? How are they integrated into your professional life? |  |
| * What would be your ideal in integrating your personal life with your professional life? Or are these interests best served separately? Or a combination of both? |  |
| * How does your history affect the reason why you chose to be a lawyer? How does it affect your practice today? |  |
| * How do your hopes and dreams for the future affect your professional decisions? |  |
| * At the end of your career, what would you like to have accomplished? Has this changed over the duration of your practice? If so, how? |  |
| * Do an activity related to the mentee’s personal interests. |  |