Colorado Lawyer Self-Assessment Mentoring Plan

Revised May 2026

NOTE: The following discussion topics, learning objectives, and resources are informational in value. Mentoring pairs can and should modify this mentoring track to more fully reflect the unique mentoring goals and objectives of the mentoring relationship.

How to Use This Plan

This plan is designed for attorneys who have completed the Colorado Lawyer Self-Assessment and want to use their results as a foundation for a structured mentoring relationship. The twelve topic areas mirror the Self-Assessment's competency categories. Pairs should prioritize categories where Mentee identified areas for growth, while also drawing on areas of strength. Check ☐ in the right column as each item is completed. All hyperlinked resources are preserved and clickable.

1. INITIAL PLANNING MEETING, PERSONAL AND PROFESSIONAL DEVELOPMENT (COMPLETE ALL)

Action	Mark Completed
Schedule an initial meeting — in person where practical, or virtually — to prepare a customized mentoring plan. Use the CAMP Initial Goal Plan & Meeting Guide to develop goals for the mentoring relationship.	☐
Review Mentee's progress on the Colorado Lawyer Self-Assessment, including Mentee's responses to the Self-Assessment questions. Use the results to prioritize focus areas for the mentoring term: • Identify the two or three Self-Assessment categories where Mentee scored lowest or identified the greatest opportunity for growth. • Identify categories where Mentee is already strong and discuss how to leverage those strengths. • Create a mentoring plan that weights activities toward Mentee's priority improvement areas while maintaining a holistic view of professional development. • Discuss how the Self-Assessment results relate to Mentee's long-term career goals.	☐
In tailoring the mentoring plan to Mentee's interests, discuss short- and long-term professional and career goals and identify ways to achieve them.	☐

Action	Mark Completed
Discuss best communication methods for each attorney and consider scheduling all remaining meetings and activities for the mentoring term.	☐
Discuss communication norms for the mentoring relationship: • Preferred platforms (email, text, video call, in-person). • Response-time expectations and after-hours boundaries. • How to handle cancellations and rescheduling. • Confidentiality expectations within the mentoring relationship. • How often to revisit the Self-Assessment results as the mentoring relationship progresses.	☐
Build rapport using the following five-step framework: 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 — not just to respond. 5. Be open, not transactional.	☐
Add Other: ____	☐
Add Other: ____	☐

2. DEVELOPING A COMPETENT PRACTICE

Action	Mark Completed
Zones of Competency Analysis: Evaluate how Mentee assesses their legal competencies. Develop an analysis of practice areas, matter types, client types, and Colorado judicial districts where Mentee feels competent. Create a plan for Mentee to routinely revisit and update this analysis. • Use the Self-Assessment results to identify specific subject-matter or skill gaps that the Zones of Competency analysis should address. • Discuss how competency expectations change over the course of a career — what was sufficient at year one may not be at year five.	☐
Long-Term Competency Growth: Highlight areas where Mentee may not feel competent today but wishes to improve. Generate a long-term plan for Mentee to obtain necessary competencies in these areas of interest. • Identify CLEs, co-counseling opportunities, supervised practice, and mentorship resources. • Set a 12-month learning goal in at least one identified growth area.	☐

Action	Mark Completed
Short-Term Competency Plan: Assist Mentee in developing a plan for the event that Mentee is approached to handle a matter or client outside of their Zone of Competency. Included in this plan should be the educational resources, mentors, co-counselors, and other resources Mentee can access to timely acquire the required competency.	☐
Discuss bar association involvement as a means to develop referral relationships and competency networks — including local, state, and national associations in Mentee's specific practice area.	☐
Technology Competency (see Colorado RPC 1.1, Comment [8]): • What AI-assisted research or drafting tools are relevant to Mentee's practice area? • How to critically evaluate and verify AI-generated output before relying on it. • Staying current: CLE resources, bar technology committees, and legal technology publications.	☐
Add Other: ____	☐
Add Other: ____	☐

3. COMMUNICATING IN AN EFFECTIVE, TIMELY, PROFESSIONAL MANNER

This section should be creatively tailored for the participating organization's mentoring program or the individual mentoring plan (if not connected to a participating organization). The following are suggested discussion topics for pairs to select from based on the Mentee's Self-Assessment results in this category:

Action	Mark Completed
Client Communication: • Returning calls and emails promptly; what "timely" means in different practice settings. • Written vs. verbal communication: when each is appropriate and how to use each effectively. • Keeping clients informed without overwhelming them; managing client expectations about process and timeline. • How to say no professionally: declining representation, declining to take a position, and communicating unfavorable outcomes.	☐
Written Communication Skills: • Legal writing style: clarity, precision, and economy of language.	☐

Action	Mark Completed
• Client letters vs. court filings vs. internal memos: how tone and format should differ. • How to use AI drafting tools effectively and ethically — including verification obligations before sending. • Proofreading, editing, and the professional cost of preventable errors.	
Oral Communication and Courtroom Presence: • Professional communication with opposing counsel, judges, and court staff. • Negotiation communication: when to be direct, when to be strategic, and when to be silent. • Virtual communication norms: how professionalism standards apply in remote proceedings and client meetings.	☐
Internal Communication (for lawyers in firms, government, or organizations): • Communicating with supervisors: delivering bad news, flagging problems early, and managing up. • Communicating with support staff: clear instructions, respectful collaboration, and appropriate supervision. • Asynchronous communication tools: Slack, email, shared platforms, and how to set clear norms.	☐
Add Other: ____	☐
Add Other: ____	☐

4. ENSURING THAT CONFIDENTIALITY REQUIREMENTS ARE MET

Action	Mark Completed
REQUIRED (complete with at least one activity from the list below)	
Core Ethics Discussion (Required): The pair should discuss: • The distinction between the Colorado RPC and general professionalism. • Attorney 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 consequences of going without it. • Technology competency obligations under RPC 1.1, Comment [8], including AI tools.	☐

Action	Mark Completed
COMPLETE AT LEAST ONE OF THE FOLLOWING	
Discuss how to screen for, recognize, and avoid conflicts of interest — including imputed conflicts, former client conflicts, and conflicts from prior employment.	☐
Discuss the responsibilities of the client and the lawyer in decision-making, and the best ways to involve a client in their case. Discuss client communications generally: how to say no to a client, billing issues, etc.	☐
Discuss preparation and proper behavior during discovery, including e-discovery obligations, proportionality, and ethical production duties.	☐
Discuss how to prepare for negotiation: when and how it is initiated; how to involve the client; ethical and professionalism obligations of negotiators; and the skills needed to be an effective negotiator and how to acquire them.	☐
Discuss appropriate ways to handle situations where a lawyer believes another lawyer has committed an ethical violation or acted unprofessionally; the obligation to report misconduct; and how to handle pressure from a senior colleague to act unethically or unprofessionally.	☐
Discuss the grievance process and a lawyer's duty to cooperate with a disciplinary investigation by the Office of Attorney Regulation Counsel.	☐
Discuss client development and marketing, appropriate procedures, and ethical implications — including Colorado's rules on advertising and solicitation.	☐
Discuss Colorado's high standard of confidentiality under RPC 1.6 and associated comments, including: • The scope of the duty of confidentiality beyond just "privileged" information. • Permissive disclosure exceptions and when they apply. • Confidentiality in the digital age: cloud storage, email security, AI tools, and remote-work environments. • Client instructions that conflict with confidentiality duties and how to navigate them.	☐
Discuss AI-specific confidentiality obligations: • What constitutes "confidential information" when inputting facts into an AI tool. • How to evaluate AI vendor data retention and privacy policies. • Firm and organizational policies on approved AI tools. • Evolving bar guidance on AI and client confidentiality in Colorado.	☐
Add Other: ____	☐

Action	Mark Completed
Add Other: ____	☐

5. AVOIDING CONFLICTS OF INTEREST — LITIGATION AND TRANSACTION EXPERIENCES

Action	Mark Completed
Discuss types of alternative dispute resolution (ADR) such as mediation, arbitration, early neutral evaluation, summary jury trials, and collaborative law practice. Discuss when each is most appropriate and the role of the attorney in each process.	☐
Mentee attends one of the ADR proceedings listed above. The pair discusses and evaluates what was observed, including how conflicts of interest can arise in ADR proceedings and how to manage them.	☐
Mentee attends or participates in a deposition. The pair discusses and evaluates what was observed, including preparation, questioning strategy, and objection practice.	☐
Mentee attends or participates in part or all of a trial — civil or criminal, bench or jury, state or federal. The pair discusses and evaluates what was observed.	☐
Mentee attends or participates in an appellate oral argument before the Colorado Supreme Court, Colorado Court of Appeals, or the Tenth Circuit. The pair discusses and evaluates what was observed.	☐
Mentee attends or participates in a hearing before a state or local administrative body (e.g., local zoning board, tax equalization board, state licensing or regulatory body). The pair discusses and evaluates what was observed.	☐
Mentee observes a real estate closing or other business transaction or financial closing. The pair discusses and evaluates what was observed.	☐
Mentee attends an estate planning document execution meeting. The pair discusses and evaluates what was observed.	☐
Mentee attends or participates in a planning/strategy meeting regarding a business transaction or estate planning matter. The pair discusses and evaluates what was observed.	☐
Mentee attends or participates in a meeting, hearing, or other proceeding specific to Mentee's or Mentor's practice area. The pair discusses and evaluates what was observed.	☐
Discuss potential conflicts within legal organizations and how to create a screen or ethical wall:	☐

Action	Mark Completed
• When screening is permissible and what it must include under Colorado RPC 1.10. • How to communicate a screen to affected attorneys without waiving privilege. • Conflict-check software and procedures: how to set them up, how to use them, and what to do when a conflict is identified. • Conflicts in the AI context: how using shared AI tools can create unexpected information-sharing issues.	
Add Other: ____	☐
Add Other: ____	☐

6. MAINTAINING APPROPRIATE FILE AND RECORDS MANAGEMENT SYSTEMS

Action	Mark Completed
REQUIRED (complete with at least one activity from the list below)	
Discuss law office management best practices (preferably including a tour of Mentor's office if practical) and the importance of maintaining organized procedures: • Time records and timekeeping discipline. • Records of client-related expenses. • Billing system and invoicing cycles. • Client retainer and payment schedules; types of fee agreements. • Escrow and trust accounts; establishing a COLTAF; accounting, auditing, use of interest proceeds; proper procedures for handling client funds and other property. • Filing system and procedures (physical and digital). • Document retention plan (see RPC 1.16A). • Calendar reminder and docketing systems; avoiding missed deadlines. • Information technology systems and cybersecurity basics. • Library and legal research systems, including AI-assisted research tools. • Other resources: publications, seminars, equipment.	☐
COMPLETE AT LEAST ONE OF THE FOLLOWING	
Discuss the role and responsibilities of paralegals, assistants, and other office personnel, and how to establish good working relationships with support staff, colleagues, and senior partners. Discuss the "care and feeding" of support staff.	☐

Action	Mark Completed
Discuss practices to maintain client confidentiality, including digital security, cloud storage, and managing confidentiality in remote-work environments.	☐
Discuss good time management skills and techniques: managing competing deadlines, avoiding burnout, and protecting time for professional development and client service.	☐
Discuss how to screen for, recognize, and avoid conflicts of interest — including the use of conflict-check software and related procedures.	☐
Discuss how to prevent unauthorized practice of law issues with staff, including supervision obligations and the limits of paralegal authority.	☐
Discuss office politics: appropriate networking, socializing, and personal behaviors that reflect professional values and support a positive workplace culture.	☐
Discuss planning ahead for handling the practice in the event of retirement, disability, or death — including client notification obligations and designating a successor attorney.	☐
Discuss the issues surrounding leaving a firm: how to protect yourself, properly advise clients of their rights, withdraw from cases, and avoid ethical pitfalls during transitions. See RPC 1.16.	☐
Discuss evaluation and compensation procedures and professional advancement within a firm.	☐
Discuss information security, including PCI compliance for attorneys who take credit card payments. See: LawPay PCI Compliance • Password hygiene, multi-factor authentication, and secure remote access. • Risks of phishing, ransomware, and wire fraud targeting law firms. • Attorney ethical obligations related to data security under Colorado RPC 1.6 and associated comments. • What to do if a data breach occurs: notification obligations and response planning.	☐
Add Other: ____	☐
Add Other: ____	☐

7. MANAGING THE LAW FIRM, LEGAL ENTITY, AND STAFF APPROPRIATELY

<table>
<tr><th>Action</th><th>Mark Completed</th></tr>
<tr><td>Discuss the importance of client communication and how to maintain appropriate ongoing communication: returning telephone calls and emails promptly to keep clients informed, including use of fee agreements, timeliness, written communication, and related procedures. Discuss how to deal with a “difficult” client. Discuss billing and other business aspects of the client relationship.
Develop a client communication policy for Mentee’s practice.
Discuss how AI-assisted client communication tools (chatbots, automated updates) can help — and the ethical limits on automated communication.</td><td>☐</td></tr>
<tr><td>Discuss proper legal counseling: the duties and responsibilities of advising clients, the respective roles of client and lawyer in decision-making, and how to deal with a “difficult” client.
When the client’s instructions conflict with the attorney’s professional judgment.
How to document disagreements with a client’s decision so the record is clear.
The ethics of following client instructions that the attorney believes to be unwise but not illegal or unethical.</td><td>☐</td></tr>
<tr><td>Discuss the initial meeting and interaction with a potential client: gathering information about the matter, appraising credibility and trust, evaluating whether to accept the representation, and how to decline representation professionally. Discuss making and accepting referrals.
Developing an intake process: what information to collect, how to document it, and what screening questions identify red flags.
Engagement letters: essential provisions for every fee agreement.</td><td>☐</td></tr>
<tr><td>Discuss the termination of the attorney-client relationship: issues with terminating mid-representation, necessary steps and documentation under RPC 1.16.
Mandatory withdrawal vs. permissive withdrawal: when the attorney must withdraw and when they may.
How to protect the client’s interests during and after withdrawal.
File surrender: what belongs to the client, what the attorney may retain, and Colorado’s retention rules under RPC 1.16A.</td><td>☐</td></tr>
<tr><td>Discuss technology tools for managing the legal entity and staff:
Practice management software (Clio, MyCase, etc.): what to look for and how to evaluate options.
Electronic file management, document storage, and version control.
Delegation and supervision of staff using technology-enabled workflows.</td><td>☐</td></tr>
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Action	Mark Completed
• AI tools that can reduce administrative burden: document drafting, scheduling, time entry.	
Add Other: ____	☐
Add Other: ____	☐

8. UTILIZING APPROPRIATE FEES AND TRUST ACCOUNT BEST PRACTICES

Action	Mark Completed
Attend Trust Account School offered by the Office of Attorney Regulation Counsel. Discuss key takeaways with Mentor after attending, including how the material applies to Mentee's specific practice setting.	☐

Discuss law office financial best practices:
• **Start-up costs:** Essentials vs. non-essentials; first-year budget planning; funding options.
• **Budget & financial planning for the first year:** Revenue projections; managing cash flow; break-even analysis.
• **Projecting revenue:** How to set realistic income goals and adjust based on actual performance.
• **Law firm profitability:** Understanding realization rate, utilization rate, and other key financial metrics.
• **Alternative fee structures:**
    ◦ Flat fee: structuring, scoping, and ethical requirements.
    ◦ Contingency fee: rules, disclosures, and risk management.
    ◦ Unbundled/limited scope services: how to structure and document.
    ◦ Subscription billing: emerging models and client communication.
• **Billing and collections procedures:**
    ◦ How to take credit card payments and associated ethical considerations.
    ◦ Invoice/bill drafting: clarity, detail level, and what clients find valuable.
    ◦ Client-related expenses: what can be passed through and how.
    ◦ Collecting unpaid fees: when and how to pursue collection; liens; fee arbitration.
    ◦ Third-party payors: conflicts, confidentiality, and control issues.
• **Setting up a trust account:** COLTAF accounting; what goes in and out of trust; when to transfer funds; how to disburse; ethical rules and common violations.
	☐

Action	Mark Completed
Discuss AI and technology tools in billing and financial management: • Time-entry software and AI-assisted timekeeping tools. • E-billing platforms and client portal payment options. • How AI can help identify billing inefficiencies and improve realization rates. • Ethical obligations when using automated billing tools: accuracy, transparency, and client communication.	☐

9. WORKING TO IMPROVE THE ADMINISTRATION OF JUSTICE AND ACCESS TO LEGAL SERVICES

Action	Mark Completed
Get acquainted with legal aid programs, local pro bono programs, and other opportunities for civic and charitable legal service. Discuss the benefits of volunteer legal service: substantive learning, mentorship, networking, and referrals. Discuss how to overcome impediments such as time constraints and training in new practice areas. • Colorado Legal Services, Metro Volunteer Lawyers, and other CAMP-affiliated programs. • Colorado's aspirational standard of 50 hours per year and how to work toward it. • How AI and technology tools — legal chatbots, document automation, self-help platforms — are changing access to justice and the role of the attorney in this ecosystem.	☐
Mentee attends a civic club or community service activity in which Mentor participates. Discuss the professional and personal value of community engagement — and how it connects to Mentee's sense of professional purpose.	☐
The pair participates in a bar-sponsored or other volunteer program delivering legal services to the public. Discuss the reasons for making time for this work.	☐
Discuss the access-to-justice gap in Colorado and what role Mentee can play in addressing it: • The demographics of unmet legal need in Colorado. • How different practice models (flat fee, unbundled, subscription) can make legal services more accessible. • How AI and legal technology tools are expanding access — and the ethical considerations they raise. • Court self-help centers, lawyer referral services, and other infrastructure Mentee can support.	☐
Add Other: ____	☐

10. LAWYER WELL-BEING

Action	Mark Completed
Discuss strategies for integrating a lawyer’s career and personal life, keeping daily stress in perspective, reconciling job expectations with actual experience, and maximizing career satisfaction. • Discuss the risk of substance use and mental health issues in the legal profession; what work-life integration means to Mentee. • Discuss how work-life integration fits into the overall health of the legal profession and the importance of promoting it with other attorneys, including co-workers, co-counsel, and opposing counsel. • Suggested discussion topics: mindfulness, law school debt management, raising a family while lawyering, self-care and stress management, how to identify when one is neglecting self-care, scheduling self-care, emotional intelligence, and the legal profession.	☐
Engage Mentee in a self-reflective exercise on the six dimensions of well-being: • **Emotional:** Recognize and manage emotions; seek mental health support when needed. • **Occupational:** Cultivate satisfaction, growth, and financial stability in work. • **Intellectual:** Pursue continuous learning and creative challenges. • **Spiritual:** Develop a sense of meaning and purpose. • **Social:** Build connection, belonging, and a well-developed support network. • **Physical:** Maintain activity, nutrition, sleep; minimize harmful substance use.	☐
Mentee participates in a self-care ritual with Mentor. Discuss how Mentor incorporates self-care into their life and why self-care is important — including as a professional obligation, not just a personal one.	☐
Discuss the benefits of the Colorado Lawyer Assistance Program (COLAP) and how it can be a resource to any lawyer needing confidential assistance for any career challenge that interferes with the ability to be a productive member of the legal community — including but not limited to: Practice Management, Work/Life Integration, Stress/Anger Management, Anxiety, Depression, Substance Use, and Relationship Issues. • Discuss how to access COLAP services confidentially, and reassure Mentee that using COLAP is a sign of strength, not weakness. • Discuss specific COLAP resources relevant to issues Mentee has identified in the Self-Assessment or in conversation.	☐
Discuss resilience planning: how does Mentee assess their own resiliency? What factors account for it? Discuss a plan for improvement: • The role of peer support, mentorship, and professional community in sustaining resilience.	☐

Action	Mark Completed
• How to recognize early warning signs of burnout and what to do about them. • How the Self-Assessment results can serve as a baseline for measuring progress over time.	
Add Other: ____	☐

11. DIVERSITY, EQUITY, INCLUSION, AND ACCESSIBILITY (COMPLETE AT LEAST TWO)

Action	Mark Completed
Discuss what diversity, equity, inclusion, and accessibility mean to both Mentee and Mentor, and how these concepts manifest in the legal profession. Create a safe space for conversation on how the profession is incorporating these values and how it can continue to improve. Describe what an ideal practice and legal profession would look like based on these principles.	☐
Discuss the dimensions of identity for Mentor and Mentee. Which identities are most salient? How have they served each person in the legal profession? How have they created challenges or limitations?	☐
Discuss roadblocks and challenges each may have experienced due to underrepresented identities. What strategies were used? What resources were helpful? What was missing, and how might those gaps be addressed?	☐
Engage in a cultural empathy self-assessment using the Cultural Competence Self-Assessment Checklist. Discuss how cultural empathy supports effective legal representation and a more equitable legal community.	☐
Attend a diversity awareness or training workshop or CLE together. Discuss takeaways and next steps. See: • CBA-CLE Equity, Diversity & Inclusion Courses	☐
Discuss various career paths and how they relate to Mentee's personal and professional identities and goals: • Examine resources for underrepresented attorneys in organizations appropriate to Mentee's career path. • Discuss how these paths might influence or support Mentee's professional identity and goals.	☐
Discuss how DEI intersects with the specific Self-Assessment areas Mentee is working on: • How bias affects client intake, representation decisions, and access to justice.	☐

Action	Mark Completed
• How cultural competency supports effective client communication and counseling. • How DEI considerations apply to law office management: hiring, supervision, and workplace culture.	

DEI Resources

Videos:

- Reimagining Law: DEI in the Legal Profession — What's Working and What Isn't
- Reimagining Law: Systemic Racism in the Legal Profession
- Reimagining Law: Supporting LGBTQ+ Legal Professionals
- Reimagining Law: Creating a Sense of Belonging in the Legal Profession
- Reimagining Law: How Lawyers Can Combat Discriminatory Behavior

Articles:

- Commission's DEI News and Articles
- 3 Ways Lawyers Can Promote DEI with the CBA Racial Justice Coalition
- Inclusive Language is Allyship

American Bar Association:

- Bias Interrupters Project — You Can't Change What You Can't See: Interrupting Racial and Gender Bias in the Legal Profession
- Model Diversity Survey from the Commission on Racial and Ethnic Diversity in the Profession
- Implicit Bias Videos and Toolkit from the ABA Diversity and Inclusion Center

12. INTEGRATION AND DEVELOPMENT OF "WHOLE-PERSON LAWYERING"

Action	Mark Completed
COMPLETE AT LEAST TWO OF THE FOLLOWING	
This component 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 their perspective and how this perspective shapes their practice of law: • What are your values and how do they fit with your choice to become an attorney? How are they expressed in your practice? • Do you have a spiritual context — a religion, relationship with nature, or guiding philosophy? How does it shape 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 they relate directly to your practice?	☐

Action	Mark Completed
• What talents express the most essential parts of your personal identity? Do you feel you are fully expressing all dimensions of your perspective and experience? How would doing so 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 your ideal integration of personal and professional life look like? Or are these interests best served separately? • 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? • Do an activity related to the Mentee's personal interests.	
Connect Whole-Person Lawyering to the Self-Assessment results: • How do Mentee's values, history, and strengths show up in the Self-Assessment areas where they are strongest? • How might a more whole-person approach to practice address some of the areas Mentee identified for growth? • How can Mentee use the Self-Assessment as an ongoing tool for self-reflection — not just a one-time exercise?	☐
Discuss professional legacy and long-term purpose: • At the end of this mentoring relationship, what would Mentee like to have accomplished? • How does the work done through this mentoring plan connect to Mentee's larger professional story? • How can Mentor and Mentee use the Self-Assessment as a tool for ongoing professional growth beyond this mentoring term? • Discuss how Mentee might give back by mentoring others as their career advances.	☐

This mentoring plan is a living document. Pairs are encouraged to revisit Self-Assessment results, adjust activities to fit emerging needs, and document their progress throughout the mentoring term. For questions, modifications, or program support, contact the Colorado Attorney Mentoring Program (CAMP).