Modern Law Practice Mentoring Plan

Revised May 2026

How to Use This Plan

This curriculum guides modern law practice mentor-mentee pairs through fifteen topic areas over the mentoring term. Check ☐ in the right column as each item is completed. Items marked **REQUIRED** must be completed; for others, complete the minimum number specified. All hyperlinked resources are preserved and clickable.

1. INITIAL PLANNING MEETING, PERSONAL AND PROFESSIONAL DEVELOPMENT

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. Discuss best communication methods and consider scheduling all remaining meetings and activities for the term.	☐
In tailoring the plan to Mentee's interests, discuss long-term career goals, professional identity, and ways to achieve them.	☐
Mentor should introduce Mentee to the firm's attorneys and staff (if applicable) and discuss the culture and expectations of the practice.	☐
If Mentee has already started a modern law practice, encourage them to complete the Colorado Lawyer Self-Assessment, with a specific focus on Section 9 (Access to Justice). Review Mentee's responses and incorporate areas for improvement into this plan.	☐
Include a day-in-the-life discussion: work-life integration, mental health and substance use issues facing lawyers, and services available to attorneys regarding these health issues.	☐
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.	☐

Action	Mark Completed
5. Be open, not transactional.	
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.	☐

2. PROFESSIONAL IDENTITY IN MODERN REPRESENTATION AND LEGAL ENTREPRENEURSHIP

Action	Mark Completed
Meet to discuss the rise of modern representation and legal entrepreneurship over the past decade. How has the profession changed, and what forces are driving continued evolution (technology, access to justice demands, changing client expectations, AI)?	☐
Discuss specifically how modern representation fits within the overall legal profession and the importance of this field. Consider: • The access-to-justice gap and the role of modern law practice in addressing it. • How unbundled, flat-fee, and subscription models expand who can access legal services. • How Mentee's practice model expresses their professional values and identity.	☐
Consider the need for modern law practitioners in rural communities throughout Colorado. How can technology-enabled modern law practice positively impact these communities? • Remote client intake, virtual hearings, and e-filing as rural practice enablers. • Challenges unique to rural practice: connectivity, local bar culture, courthouse relationships. • How modern practitioners can serve as a bridge between rural Coloradans and the legal system.	☐
Discuss the "target market" for modern law practitioners. Include in your discussion: • The financial profile and legal needs of middle-market clients. • The values and beliefs clients employ when seeking affordable legal assistance. • How to identify, reach, and retain the right clients for your practice model.	☐

Action	Mark Completed
• Ethical limits on client targeting and how to market honestly and compliantly.	
Discuss what it means to be a legal entrepreneur: the mindset shifts required, the risks and rewards, and how entrepreneurial identity intersects with professional identity as an attorney. • What personality traits and risk tolerances align with running a modern law practice? • How to maintain professional obligations while thinking like a business owner. • Identifying role models: who is doing modern law practice in ways that inspire Mentee?	☐

3. THE COLORADO BAR AND LEGAL COMMUNITY

Action	Mark Completed
COMPLETE AT LEAST ONE OF THE FOLLOWING	
Attend a Modern Law Practice Initiative bar association meeting or attorney networking event with Mentor. Introduce Mentee to other lawyers focused on modern representation. Discuss the advantages of bar association involvement and the associations available to legal entrepreneurs.	☐
Attend Trust Account School offered by the Office of Attorney Regulation Counsel. Discuss key takeaways and how trust account management applies to modern fee structures (flat fee, subscription, unbundled).	☐
Visit the local courthouse(s), particularly where Mentee may appear. Make introductions to members of the judiciary, court personnel, and clerks of court. Discuss customary rules of civility, etiquette, and e-filing procedures.	☐
Attend Modern Representation 101 or other modern law practice courses offered by CBA/CLE. Discuss takeaways and how course content applies to Mentee's practice.	☐
Discuss the benefits of the Colorado Lawyer Assistance Program (COLAP) as a confidential resource for any career challenge, including practice management, work-life integration, stress management, anxiety, depression, substance use, and relationship issues.	☐
Consider joining the Above The Line Network (ATLN), a national network committed to improving access to justice for the middle market — a collaborative community where ideas, resources, and best practices are shared and scaled.	☐

Action	Mark Completed
Discuss online and virtual community-building for modern law practitioners: • LinkedIn and legal entrepreneur communities. • State bar listservs and modern law practice forums. • National organizations supporting alternative practice models. • Thoughtful use of social media to build visibility within ethical boundaries.	☐

4. COLORADO RULES OF PROFESSIONAL CONDUCT, PROFESSIONALISM, AND CIVILITY

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, client, and opposing counsel. • Common ethical issues in modern law practice and resources for resolving them. • Common grievance and malpractice "traps" and how to avoid them. • The benefits of malpractice insurance and the consequences of going without it. • Technology competency obligations under RPC 1.1, Comment [8].	☐
COMPLETE AT LEAST TWO OF THE FOLLOWING	
Discuss how to screen for, recognize, and avoid conflicts of interest — including issues unique to high-volume or unbundled practice models.	☐
Discuss the respective responsibilities of client and lawyer in decision-making. Cover client communications broadly: how to say no to a client, navigating billing conversations, and managing expectations in flat-fee and subscription arrangements.	☐
Discuss creating and managing positive, productive relationships with opposing counsel — including how to maintain civility under pressure and the long-term professional value of a good reputation.	☐
Discuss preparing for negotiation: when and how it is initiated, how to involve the client, ethical obligations of negotiators, and the skills needed to negotiate effectively.	☐
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.	☐

Action	Mark Completed
Discuss the grievance process and a lawyer's duty to cooperate with a disciplinary investigation.	☐
Discuss client development and marketing: appropriate procedures, ethical implications, and the rules on advertising and solicitation as they apply to modern practice.	☐
Discuss the Colorado RPC as applied to unbundled and limited-scope services. Use: • Colorado Formal Ethics Opinion 101 • ABA Unbundling Resource Center • DU Unbundling Best Practices	☐
Discuss how the Colorado RPC and professionalism can present unique challenges for attorneys from underrepresented groups, including female attorneys. Discuss ways to avoid common pitfalls and how to respond when facing unprofessional conduct from others.	☐
Discuss AI-specific ethics considerations in modern law practice: • Competency obligations when using AI-assisted drafting and research tools. • Client confidentiality when inputting facts into AI platforms. • Disclosure considerations for AI-generated work product. • Supervision obligations and verifying AI output before filing or sending.	☐

5. LAW PRACTICE START-UP

Action	Mark Completed
REQUIRED	
Read the CBA's Successful Business Planning for the Modern Law Practice (Toolkit). Discuss the topics in each chapter as a roadmap to creating or transitioning to a modern law practice.	☐
COMPLETE AT LEAST TWO OF THE FOLLOWING	
FINANCE: Starting a practice requires upfront investment. Work with Mentee to: • List essentials vs. non-essentials and their costs. • Build a first-year budget with initial and monthly costs. • Develop revenue projections to set realistic income goals. • Discuss funding options: personal savings, small business loans, credit lines. • Discuss when and how to reinvest revenue into the practice. *See Toolkit: Chapter One — Prepare a Budget.*	☐

Action	Mark Completed
MARKETING: Modern clients search online before ever calling a lawyer. Work with Mentee to: • Develop a marketing plan that identifies target clients and referral sources. • Choose marketing channels aligned with Mentee's strengths (content, social, networking). • Build in analytics: how to measure what's working and iterate. • Discuss the advantages of a modern law practice: accessibility, predictable billing, affordability, proactive client updates. • Discuss accessibility for rural and mountain practitioners to Denver-area resources. *See Toolkit: Chapter Six.*	☐
OPERATIONS: Running a profitable practice means running it like a business. Discuss: • Office setup: home office, virtual office, coworking space, or traditional office. • File organization, matter management, and opening new client matters. • Client communication systems and response time policies. • Whether and how to contract administrative or paralegal support. • Policies and procedures that ensure smooth, consistent administration. *See Toolkit: Chapter One — Basic Law Practice Checklist.*	☐
RISK MANAGEMENT: Every practice faces exposure. Discuss strategies to minimize impact: • Selecting a malpractice insurance provider and choosing coverage options. • Data security: cybersecurity basics, cloud storage, and breach response. • Physical document retention and storage policies. • Backup technology systems and disaster recovery planning. • Succession planning: what happens to clients if you are incapacitated? *See Toolkit: Chapter Ten — Legal Malpractice Insurance.*	☐
TECHNOLOGY: Technology is the present and future of modern law practice. Discuss: • Essential tech stack: practice management software, e-signature, billing, secure client portal. • AI-assisted drafting and research tools: capabilities, limitations, and ethical considerations. • Virtual practice tools for serving rural and remote clients effectively. • How to evaluate and adopt new tools without disrupting current workflows. • Cybersecurity hygiene: password management, MFA, secure file sharing. *See Toolkit: Chapter Eight.*	☐

6. LAW OFFICE MANAGEMENT AND IN-OFFICE PROCEDURES

<table>
<tr><th>Action</th><th>Mark Completed</th></tr>
<tr><td colspan="2">REQUIRED (complete with at least one activity from the list below)</td></tr>
<tr><td>Operational Best Practices (Required): Discuss law office management, including a tour of Mentor’s office if applicable:
Time records and timekeeping discipline.
Filing systems and document management (physical and digital).
Document retention plan and secure destruction.
Calendar and docketing systems to avoid missed deadlines.
Library and legal research systems, including AI-assisted tools.
Document sharing and e-signatures for remote or virtual practice.
Online billing and invoicing access for clients.
Other resources: MLPI, publications, seminars, equipment, CLEs.</td><td>☐</td></tr>
<tr><td>Financial Best Practices (Required): Discuss:
Start-up costs and first-year financial planning.
Projecting revenue and understanding law firm profitability.
Alternative fee structures: flat fee, contingency, unbundled services, subscription billing.
Billing and collections: how to take credit card payments, invoice drafting, collecting unpaid fees, third-party payors.
Trust accounts: setting up COLTAF, accounting, when to transfer funds, ethical rules.</td><td>☐</td></tr>
<tr><td>Marketing Best Practices (Required): Discuss:
Law firm branding and personal branding.
Business card optimization and networking fundamentals.
Website building blocks and search engine optimization (SEO).
Blogging, social media, and email marketing.
Ethical considerations in lawyer advertising.
Advantages of modern practice: accessibility, predictable billing, affordability, proactive client updates.
Accessibility for rural and mountain practitioners to Denver-area resources.</td><td>☐</td></tr>
<tr><td>Risk Management Best Practices (Required): Discuss:
Starting a small business: entity selection and tax implications.
Developing a business plan.
Taking on partners or of-counsel arrangements.
Selecting malpractice insurance and coverage options.
Succession planning and data security.
Cloud storage, physical document retention, and backup systems.</td><td>☐</td></tr>
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Action	Mark Completed
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 and office-sharing colleagues.	☐
Discuss practices to maintain client confidentiality, including in virtual and remote work environments.	☐
Discuss good time management skills and techniques for a modern law practice: managing competing deadlines, batching similar tasks, and protecting deep-work time.	☐
Discuss how to screen for, recognize, and avoid conflicts of interest — especially in high-volume or unbundled practice models.	☐
Discuss how to prevent unauthorized practice of law issues with staff, including supervision of virtual assistants and non-attorney contractors.	☐
Discuss office dynamics and appropriate professional behaviors in coworking or office-sharing environments.	☐
Discuss succession planning: what happens to the practice in the event of retirement, disability, or death — including client notification obligations.	☐
Discuss wrapping up a solo firm: how to protect yourself, advise clients of their rights, and withdraw from cases.	☐
Discuss the benefits and challenges of a collaborative law practice, co-working space, or office-sharing arrangement.	☐

7. PROFESSIONALISM IN WORKING WITH CLIENTS

Action	Mark Completed
COMPLETE AT LEAST THREE OF THE FOLLOWING	
Review the Colorado Principles of Professionalism together. Select at least three principles for deeper discussion as applied to Mentee's modern law practice. Consider: fee agreements, flat-fee and subscription billing structures, and limitations of engagement in unbundled representation.	☐
Discuss the initial meeting with a potential client: gathering information, appraising credibility, evaluating whether to accept the representation, how to decline professionally, and making and accepting referrals.	☐

Action	Mark Completed
Discuss the importance of client communication and strategies to maintain it: returning calls and emails promptly, keeping clients informed, written communication practices, and the value of a formal communication policy.	☐
Discuss proper legal counseling: the duties and responsibilities of advising clients, and the respective roles of client and lawyer in decision-making.	☐
Discuss communicating with clients about the business relationship: billing, collections policies, and how to navigate financial conversations professionally in flat-fee or subscription contexts.	☐
Discuss client-centered lawyering. Consider: • Do You Have a Client-Centered Law Practice? (Sullivan, 2016) • Who is My Client? Client-Centered Lawyering with Multiple Clients (Lawton, 2015)	☐
Discuss how to deal with a "difficult" client: recognizing warning signs, evaluating when to withdraw, avoiding ethical pitfalls, and professionally terminating a client relationship. See: The Art of Managing Clients — Even the Difficult Ones	☐
Discuss the termination of the attorney-client relationship: issues that arise mid-representation, necessary steps and documentation under RPC 1.16.	☐
Discuss client communication in modern practice: client portals, secure messaging, managing expectations about AI-generated work product, and accessibility and language access.	☐

8. LITIGATION AND TRANSACTION EXPERIENCES

Action	Mark Completed
COMPLETE AT LEAST TWO OF THE FOLLOWING	
Discuss types of ADR: mediation, arbitration, early neutral evaluation, summary jury trials, and collaborative law practice. Discuss when each is most appropriate and how limited-scope representation can intersect with ADR.	☐
Mentee attends one of the ADR proceedings above. The pair discusses and evaluates what was observed.	☐
Mentee attends or participates in a deposition. The pair discusses preparation, questioning strategy, and what was observed.	☐
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 courtroom demeanor, evidence, and advocacy.	☐

Action	Mark Completed
Mentee attends or participates in an appellate oral argument before the Colorado Supreme Court, Colorado Court of Appeals, or 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., zoning board, tax equalization board, licensing body). The pair discusses and evaluates what was observed.	☐
Mentee observes a real estate closing or other business or financial transaction closing. The pair discusses deal structure and what was observed.	☐
Mentee attends an estate planning document execution meeting. The pair discusses client preparation and execution formalities.	☐
Mentee attends or participates in a planning or strategy meeting for a business transaction or estate planning matter. The pair discusses and evaluates what was observed.	☐
Mentee attends or participates in a meeting, hearing, or proceeding specific to Mentor's or Mentee's practice area. The pair discusses and evaluates what was observed.	☐
Discuss virtual and remote proceedings in modern practice: • Best practices for appearing in virtual hearings: technology setup, background, demeanor. • E-filing systems and electronic document management. • How limited-scope representation intersects with different proceeding types.	☐

9. WORK-LIFE BLEND IN THE LEGAL PROFESSION

Action	Mark Completed
Discuss strategies for integrating career and personal life in a modern law practice: keeping daily stress in perspective, reconciling job expectations with actual experience, and maximizing career satisfaction. Include: • What work-life blend means to Mentee, and a self-assessment of how they are currently doing. • The risk of substance use and mental health issues; available resources. • How work-life blend fits into the health of the legal profession more broadly. • Mindfulness; law school debt management; raising a family while lawyering; self-care and stress management; emotional intelligence; scheduling self-care; identifying when you are neglecting it.	☐

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<tr><th>Action</th><th>Mark Completed</th></tr>
<tr><td>Participate in a self-care ritual with your Mentor. Discuss how Mentor incorporates self-care into their life and why it matters, specifically in the context of running a modern law practice.</td><td>☐</td></tr>
<tr><td>Discuss resilience and stress perception (drawing on George Bonanno’s research): how you perceive stress directly influences how you respond to it. When lawyers believe they have resources to handle a stressor, they view it as a challenge; when they feel lacking, stress becomes a threat. Rigid responses to stress can lead to:
Increased errors and missed deadlines.
A “protect my turf” mentality.
Diminished collaboration and collegiality.
Poorer work quality and survival-based reactions (defensiveness, hypercriticality).
Discuss with Mentee what resources they have for managing professional stress and how to assess whether they are using them effectively.</td><td>☐</td></tr>
<tr><td>Discuss the unique work-life blend challenges of running your own practice:
Setting and enforcing working hours when you are the boss.
Avoiding the trap of being always “on” in a solo or small firm setting.
Managing financial uncertainty and its psychological impact.
Building a peer support network of other modern law practitioners.</td><td>☐</td></tr>
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10. PUBLIC SERVICE

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<tr><th>Action</th><th>Mark Completed</th></tr>
<tr><td colspan="2">COMPLETE AT LEAST ONE OF THE FOLLOWING</td></tr>
<tr><td>Acquaint Mentee with legal aid programs, local pro bono programs, and other opportunities for civic and charitable legal service. Discuss the benefits: substantive learning, mentorship, networking, and possible referrals. Discuss how to overcome impediments such as time management and training in new practice areas.
Colorado Legal Services, Metro Volunteer Lawyers, and other CAMP-affiliated programs.
How pro bono work can introduce Mentee to practice areas aligned with modern law practice.
Colorado’s aspirational standard of 50 hours per year and how to work toward it.</td><td>☐</td></tr>
<tr><td>Mentee attends a civic club or community service activity in which Mentor participates. Discuss the professional and personal value of engaging in volunteer legal service.</td><td>☐</td></tr>
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Action	Mark Completed
The pair participates in a bar-sponsored or other volunteer program delivering legal services to the public (e.g., legal clinic, self-help center, expungement fair). Discuss the reasons for making time for this work.	☐

11. TRANSITION INTO A MODERN REPRESENTATION PRACTICE

Action	Mark Completed
COMPLETE AT LEAST TWO OF THE FOLLOWING	
THE CARROT: Assess what draws Mentee toward practicing law differently. What are their needs? What excites their interest? Who has the job they want? Identify at least three motivating factors and discuss courses of action. Determine the character of Mentee’s envisioned firm — technological innovation, access to justice, predictable billing, online presence, or other advantages. Use the “carrots” to guide Mentee into practice areas and service models that match their personality and values.	☐
THE STICK: Identify what Mentee is trying to move away from: a difficult partner, billable-hour pressure, trial stress, demanding clients, toxic culture. Identify three factors and strategies to overcome or engage these difficulties. *Caution: What if Mentee never liked the practice of law at all? If Mentee entered the profession to fulfill someone else’s dream, that is a heavier stick. Discuss whether a transition to modern practice will truly help Mentee reach their carrot, or whether deeper exploration is needed.*	☐
GRIT: Discuss the personality traits that support a successful career transition: initiative, creativity, flexibility, endurance, and perseverance. How hard is Mentee willing to work? Identify at least three traits to develop and discuss how to support them.	☐
ECONOMIC REALITY: Help Mentee explore and rank their priorities. Career transitions require balancing economic stability with professional goals. Together, create a spreadsheet of income, expenses, and savings. Discuss short-term (0–3 months) and long-term (2–5 years) goals with a loose budget.	☐
EFFECTIVE OPPORTUNITY DEVELOPMENT: Discuss how to develop opportunities through well-scripted vetting meetings with people already doing modern representation. The goal is to become known and trusted — the “insider who gets hired.” Attend three meetings or events with attorneys or stakeholders in the target practice area. Write a list of transferable skills. Draft a resume and cover letter as a reflection exercise.	☐
BUILDING YOUR TRANSITION TIMELINE: • Map out a realistic 6–12 month transition timeline from current situation to modern practice launch.	☐

Action	Mark Completed
• Identify milestones: malpractice coverage in place, trust account open, website live, first client. • Build in contingency: what if the timeline slips? What resources are available? • Discuss how to communicate the transition to existing clients and referral sources.	

12. 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 to regularly revisit and update this analysis.	☐
Long-Term Competency Growth: Identify areas where Mentee does not yet feel competent but wishes to improve. Generate a long-term plan including CLEs, co-counseling, supervised practice, and mentorship resources.	☐
Short-Term Competency Plan: Develop a plan for situations where Mentee is approached to handle a matter outside their current competency zone. Include educational resources, experienced co-counsel, referral networks, and supervising mentors.	☐
Discuss bar association involvement as a means of developing referral relationships and competency networks — local, state, and national, including modern law practice-specific organizations.	☐
Technology Competency (see Colorado RPC 1.1, Comment [8]): • What AI-assisted research or drafting tools are available in Mentee's practice setting? • How to critically evaluate and verify AI-generated output before relying on it. • Staying current: CLE resources, bar tech committees, and legal technology publications.	☐
Add Other: ____	☐
Add Other: ____	☐

13. DEVELOPING LAWYER WELL-BEING

<table>
<tr><th>Action</th><th>Mark Completed</th></tr>
<tr><td colspan="2">COMPLETE AT LEAST TWO OF THE FOLLOWING</td></tr>
<tr><td>Professional Identity Formation: Help Mentee articulate their “Professional Identity” as a modern law practitioner. Use John Bliss’ The Professional Identity Formation of Lawyers to facilitate discussion. Explore:
Why did Mentee choose the profession of law, and what do they seek to accomplish?
What characteristics, skills, and attributes will enable their success?
Who in Mentee’s personal and professional community will support them?</td><td>☐</td></tr>
<tr><td>Well-Being Assessment: Engage Mentee in a self-reflective exercise on the six dimensions of well-being. Use the ABA Well-Being Toolkit for Lawyers and Legal Employers to build an action plan:
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.</td><td>☐</td></tr>
<tr><td>Support Systems: Engage Mentee in a conversation about support systems. Who are their personal and professional support people? What additional resources do they need? How does running a solo or small modern law practice affect access to peer support?</td><td>☐</td></tr>
<tr><td>Defining Professional & Personal “Success”: Work with Mentee to build a sustainable, fulfilling definition of success.
Traditional concepts of success (wealth, power, independence) and their limits.
Unconventional paths: those who found ultimate satisfaction in purpose-driven work.
Finding your definition: picture yourself with all time and resources — what would you do?
A foundation for goals: build 2–3 primary goals from your definition of success. You’ve only failed if you’ve given up on achieving it.</td><td>☐</td></tr>
<tr><td>Assessment of Current Professional Identity: Ask Mentee to answer “What do you do?” Work together to expand the answer to include a broader view of Mentee’s strengths, interests, and professional passions.</td><td>☐</td></tr>
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<tr><th>Action</th><th>Mark Completed</th></tr>
<tr><td>Financial Well-Being: Discuss financial health as a dimension of overall well-being for a modern law practitioner:
Managing cash flow variability in a flat-fee or subscription practice.
Student loan repayment strategies, including income-driven repayment and PSLF eligibility.
Long-term financial planning: retirement accounts, disability insurance, emergency funds.
Setting aside taxes as a self-employed attorney.</td><td>☐</td></tr>
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14. DIVERSITY, EQUITY, INCLUSION, AND ACCESSIBILITY

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<tr><th>Action</th><th>Mark Completed</th></tr>
<tr><td colspan="2">COMPLETE AT LEAST TWO OF THE FOLLOWING</td></tr>
<tr><td>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 an ideal practice based on these principles.</td><td>☐</td></tr>
<tr><td>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?</td><td>☐</td></tr>
<tr><td>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?</td><td>☐</td></tr>
<tr><td>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.</td><td>☐</td></tr>
<tr><td>Attend a diversity awareness or training workshop or CLE together. Discuss takeaways and next steps. See:
CBA-CLE Equity, Diversity & Inclusion Courses</td><td>☐</td></tr>
<tr><td>Discuss various career paths (Big Law, small firm, government, corporate, legal aid, nontraditional) in relation to Mentee’s personal and professional identities and goals:
Examine resources for underrepresented attorneys in organizations appropriate to Mentee’s path.
Discuss how modern law practice, in particular, can be a vehicle for building a practice that reflects Mentee’s identity and values.</td><td>☐</td></tr>
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Action	Mark Completed
Discuss modern law practice as an access-to-justice tool: how flat-fee, unbundled, and subscription models can reach underserved communities, and how Mentee's practice design choices can reflect a commitment to equity.	☐

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

15. 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. Explore how the Mentee's unique interests, history, and talents influence their perspective and practice: • What are your values and how do they fit with your choice to become an attorney? How are they expressed in your practice today? • Do you have a spiritual context — a religion, relationship with nature, or guiding philosophy? How does it shape why and how you practice? • 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? • 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?	☐

Action	Mark Completed
• What are the key relationships in your life? How are they integrated (or not) 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 shape why you became 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 time? • Do an activity related to the Mentee's personal interests to build the mentoring relationship outside a formal legal context.	
Discuss whole-person practice as a competitive advantage in modern law: • How a clearly articulated personal identity and values make a practice more authentic and attractive to the right clients. • How hobbies, community involvement, and life experience can become referral pipelines. • How personal sustainability — boundary-setting, rest, creativity — is a business strategy, not a luxury.	☐
Financial Well-Being as Whole-Person Practice: • Managing cash flow variability and the psychological impact of financial uncertainty. • Budgeting as a self-employed attorney: separating business and personal finances. • Long-term financial planning: retirement accounts, disability insurance, emergency funds.	☐

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