



State Bar of Georgia Transition Into Law Practice Program (TILPP) MODEL MENTORING PLAN



Please complete and return the form via email to: TILPP@gabar.org
or to:

State Bar of Georgia—Transition Into Law Practice Program
104 Marietta Street NW, Suite 100, Atlanta, GA 30303

We, the undersigned Mentor (“Mentor”) and Lawyer (“Lawyer”), agree upon this Mentoring Plan detailing activities and experiences related to our participation in the Transition Into Law Practice Program (“TILPP”).

We pledge that we will fulfill this Mentoring Plan in accordance with the TILPP mission to assist Lawyer in acquiring the practical skills, judgment and professional values to practice law in a highly competent manner.

1. **AT THE START OF THE PROGRAM:**
Sign below and at the top of the following pages to indicate your understanding of all requirements. Be sure to include the Plan Start Date.
2. **UPON COMPLETION OF THE PROGRAM:**
Sign below again and indicate on the following pages the completion date of each item. Be sure to include the Plan Completion Date.

MENTOR

Mentor’s Name	Mentor’s Bar #
Mentor’s Signature	Plan Start Date
	Plan Completion Date

BEGINNING LAWYER

Lawyer’s Name	Lawyer’s Bar #
Lawyer’s Signature	Plan Start Date
	Plan Completion Date

NOTE: Mentor and Lawyer may utilize this Model Plan with no changes, or they may individualize this Model Plan by **substituting* activities appropriate to the practice setting of the Beginning Lawyer.

***ANY AND ALL CHANGES TO THIS MODEL PLAN MUST BE SUBMITTED TO AND APPROVED BY THE TILPP DIRECTOR WITHIN 90-DAYS OF BEING SWORN IN.**

**Transition into Law Practice Program
Model Mentoring Plan**

Lawyer Signature

Mentor Signature

MODEL MENTORING PLAN

The cornerstone of TILPP is the intersection between mentoring and CLE. The following activities and experiences are a structured guide to assist the Mentor and Lawyer in fulfilling the requirements of the mentoring component of TILPP, in addition to discussing topics arising from CLE seminars. This guide can be individualized by substituting* or adding additional activities or experiences relevant to Lawyer's practice setting. TILPP encourages Mentors who do not litigate to call on another experienced attorney who does litigation to assist Lawyer in satisfying the Mandatory Advocacy Experiences relative to trial observations. (Section E herein)

At the conclusion of the Mentoring year, this Model Plan will serve as Mentor's evaluative tool to determine if Lawyer has satisfactorily completed the Mentoring component of TILPP.

ANY AND ALL CHANGES TO THIS MODEL PLAN MUST BE SUBMITTED TO AND APPROVED BY THE TILPP DIRECTOR **WITHIN 90-DAYS OF BEING SWORN IN.*

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Lawyer Signature

Mentor Signature

ACTIVITY OR EXPERIENCE	DATE COMPLETED <i>(indicate below)</i>
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A. Introduction to the Legal Community

1. Mentor should contact Lawyer as soon as practicable after being assigned and arrange to meet. Mentor should introduce Lawyer to other lawyers and staff members at Mentor's office or, in the case of in-firm mentoring, ascertain if such introductions have already occurred. _____

2. Invite Lawyer to attend a local or specialty bar association or State Bar Section meeting and discuss local, state and national bar association opportunities. _____

3. Introduce Lawyer to other lawyers in the community through attendance at local or specialty bar association or State Bar section meetings. _____

4. Escort Lawyer on a tour of the local and/or federal courthouse(s) and, to the extent practicable, introduce him or her to members of the judiciary, court personnel and clerks of court. _____

5. Discuss any "unwritten" customary rules of civility or etiquette among lawyers and judges in the community. _____

6. Discuss pro bono opportunities with organizations such as Legal Aid, Georgia Legal Services, Atlanta Volunteer Lawyers Foundation and others that refer cases in the Beginning Lawyer's practice area. Advise Lawyer of pro bono opportunities and resources available through the State Bar. _____

B. Introduction to the Community at Large

1. Invite Lawyer to attend a civic club of which Mentor is a member and/or a community service activity in which Mentor participates. _____

2. Discuss civic, charitable and service opportunities in the community. _____

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Lawyer Signature

Mentor Signature

**DATE
COMPLETED**
(indicate below)

C. Introduction to Law Office Management

1. Mentor should acclimate Lawyer to the law firm environment by giving him/her a tour of Mentor's office. Mentor should demonstrate and explain how the following items of law practice management are used and handled in Mentor's office, if applicable.

- (a) Time Records _____
- (b) Records of client-related expenses _____
- (c) Billing system _____
- (d) Escrow or Trust Account and handling of clients funds _____
- (e) Filing System _____
- (f) Document Retention Plan _____
- (g) Calendar and "Tickler" or Reminder Systems _____
- (h) Information Technology Systems _____
- (i) Library and Research Systems _____
- (j) Other resources (publications, seminars, equipment, etc.) that a Lawyer might find particularly helpful in his or her work _____
- (k) Discuss good time management skills and techniques _____
- (l) Discuss practices to maintain client confidentiality _____
- (m) Discuss the role and responsibilities of paralegals, secretaries and other office personnel, and how to establish good working relationships with others in same office who are support staff, colleagues or senior partners _____

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**DATE
COMPLETED**
(indicate below)

D. Working With Your Client

1. Discuss questions and items of practical guidance learned from applicable continuing legal education ("CLE") programs attended, including responsibilities of the attorney and the client in decision making. _____
2. Discuss how to gather information about a legal matter and how to determine credibility and develop trust. _____
3. Discuss how to screen for, recognize and avoid conflicts of interest. _____
4. Discuss how to decide whether to accept representation on a legal matter. _____
5. Discuss the use of retainer or engagement letters/agreements and how to define the scope of the representation. _____
6. Discuss how to talk about and set fees for legal services. _____
7. Discuss how to deal with a "difficult" client. _____
8. Discuss "DO's and DON'TS" of maintaining ideal ongoing client relations, such as returning telephone calls and keeping clients informed about matters. _____
9. Discuss terminating the lawyer-client relationship and necessary documentation. _____
10. Participate in or observe at least one client interview or client counseling session.* _____

*** For Inside Mentors and Beginning Lawyers only.**

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E. Mandatory Advocacy Experiences

Mandatory Advocacy Experiences are required of **ALL** Beginning Lawyers, regardless of practice setting.

State Bar Rule 8-104(D)(1) provides:

"Prior to appearing as sole or lead counsel in the Superior or State Courts of Georgia in any contested civil case or in the trial of a criminal case, any newly admitted active member admitted to practice after June 30, 2005, shall complete the mandatory Advocacy Experiences of the Transition Into Law Practice Program . . .

(5) For participants in the Transition Into Law Practice Program who wish to appear as sole or lead counsel in the Superior or State Courts of Georgia in any contested civil case or in the trial of a criminal case, Mentors and beginning lawyers shall devise five (5) mandatory Advocacy Experiences tailored to the practices of the beginning lawyers." (State Bar Rule 8-104(D), Regulation (5))

The following are examples of observation types. Actual or virtual (*i.e.*, simulations or webcasts) observations can qualify. Each observation **must** last a *minimum* of one (1) hour.

- i. A deposition of a witness or adverse party in a civil action;*
- ii. A jury trial in a civil or criminal case in either a state or federal court;*
- iii. A nonjury trial, evidentiary hearing, or hearing in a state, federal, or administrative court;*
- iv. An appellate argument in the Supreme Court of Georgia, the Georgia Court of Appeals, or the 11th Circuit Court of Appeals;*
- v. A real estate transaction from initiation through closing;*
- vi. A contract negotiation and execution;*
- vii. An estate planning transaction from initial interview through document execution;*
- viii. A mediation.*

Other advocacy experiences may be selected to comply with Rule 8-104(D).

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TILPP requires completion of the MAEs by all Beginning Lawyers, even if you are not currently appearing in court. The language of MAEs being completed before appearing as sole and lead counsel is a benchmark, so that attorneys who do plan to appear in court immediately upon the start of their practice without any in-court experience have a gauge as to how soon they should complete the MAES. ***It is not meant to provide exclusion to those who do not plan to appear as sole or lead counsel.*** You are allowed to provide three experiences from law school. If you are not able to personally attend the two remaining observations, you are allowed to watch oral arguments from the Georgia Supreme Court website. You are also allowed to observe other experiences relative to your practice setting such as mediation, real estate closing transactions, contract negotiations and executions, estate planning document transactions and executions, etc. *Please ensure that you experience involves an actual observation and not an experience in which you are participating.* **TILPP encourages Lawyer to use these observations as an opportunity to meet more experienced attorneys and judges.**

Mentor should monitor, facilitate and discuss the progress of Lawyer in observing five (5) Advocacy Experiences and arrange for another experienced lawyer to discuss the context and assess each observation. The five (5) observations should be tailored to Lawyer’s practice area.

REMINDER: Three (3) of the five (5) mandatory Advocacy Experiences may be obtained after completing the 2nd year of law school. See Rule 8-104(D)(1).

LIST MANDATORY ADVOCACY EXPERIENCES:

Please give a concise description of each observation, including type of event, as well as case number, court, and judge, if applicable.

**DATE
COMPLETED**
(indicate below)

- | | | |
|----|--|--|
| 1. | | |
| 2. | | |
| 3. | | |
| 4. | | |
| 5. | | |

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F. Additional Advocacy Experiences

1. Arrange for Lawyer to observe an actual or simulated arbitration and discuss or arrange for an experienced lawyer to discuss the arbitration observed, provide relevant background context and evaluate what is observed. _____

2. Arrange for Lawyer to observe a judicial-type hearing conducted by a state or local administrative body (e.g., local zoning board; tax equalization board hearing; state licensing or regulatory board) and provide relevant background context and evaluate what is observed. _____

G. Closing and Transactional Work

Arrange for Lawyer to observe a real estate or other business transaction or financial closing and explain relevant background. _____

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H. The Obligations of Attorneys to Others

1. Discuss questions and items of practical guidance learned from applicable CLE programs attended on the topic of professionalism. _____
2. Discuss "A Lawyer's Creed" (see below) and how we as lawyers can use the law and legal process as "instruments for the common good". _____

A LAWYER'S CREED

To my clients, I offer faithfulness, competence, diligence, and good judgment. I will strive to represent you as I would want to be represented and to be worthy of your trust.

To the opposing parties and their counsel, I offer fairness, integrity, and civility. I will seek reconciliation and, if we fail, I will strive to make our dispute a dignified one.

To the courts, and other tribunals, and to those who assist them, I offer respect, candor, and courtesy. I will strive to do honor to the search for justice.

To my colleagues in the practice of law, I offer concern for your welfare. I will strive to make our association a professional friendship.

To the profession, I offer assistance. I will strive to keep our business a profession and our profession a calling in the spirit of public service.

To the public and our systems of justice, I offer service. I will strive to improve the law and our legal system, to make the law and our legal system available to all, and to seek the common good through the representation of my clients.

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I. Negotiation

1. Discuss questions and items of practical guidance learned from applicable CLE programs attended, such as:
 - (a) How to prepare for the negotiation of a legal matter (e.g., release of a personal injury claim, lease agreement, etc.)
 - (b) When and how negotiation should be initiated
 - (c) How to involve the client in negotiation
 - (d) How to negotiate with an attorney with years of experience, a friend, etc.
 - (e) Ethical and professionalism obligations of negotiators
 - (f) Skills needed to be an effective negotiator and how to acquire them
2. Arrange for Lawyer to observe an actual or simulated negotiation and explain relevant background context and then evaluate what is observed.

END OF MODEL MENTORING PLAN

Model Mentoring Plan compiled by:

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Atlanta, Georgia 30303
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