



**Illinois Supreme Court Commission on Professionalism
Lawyer-to-Lawyer Mentoring Program**

**Mentoring Plan
For Mentors and Mentees**

Revised Edition 2017



SUPREME COURT OF ILLINOIS

**CHAMBERS OF
CHIEF JUSTICE LLOYD A. KARMEIER**

**1100 SOUTH MILL STREET
PO BOX 206
NASHVILLE, IL 62263
(618) 327 0751
FAX (618) 327 0756**

Dear Colleague:

On behalf of the Justices of the Illinois Supreme Court, I thank you for your participation in the Lawyer-to-Lawyer Mentoring Program.

This program creates an opportunity for an experienced lawyer to provide professional guidance and share practical knowledge and skills with a new lawyer during the critical transition period from law student to legal practitioner. Mentoring programs serve two important goals: (1) the development of relationships between new and more experienced lawyers; and (2) providing education on professional responsibility topics. Completion of this program also qualifies for 6.0 Professional Responsibility CLE credits.

Your commitment to this year-long undertaking should benefit not only you but also the profession at large. Good mentoring is extremely valuable for building and maintaining an identity and common purpose in our profession.

Please accept our gratitude for your time and effort in this worthy endeavor.

Very truly yours,

A handwritten signature in black ink, appearing to read "Lloyd A. Karmeier".

Hon. Lloyd A. Karmeier, Chief Justice
Illinois Supreme Court

Welcome to the Illinois Supreme Court Commission on Professionalism's Lawyer-to-Lawyer Mentoring Program

This document contains all the information you will need to successfully complete the Lawyer-to-Lawyer Mentoring Program. Please contact your Program Administrator when questions arise.

Mentor and Mentee Program Requirements and Checklist

□ 1. Participate in the Program Orientation.

Chances are that you are reading this while sitting at your program orientation session. Today, you will be asked to do three things:

- a. **WATCH** a brief [Program Orientation](#) presentation on the history and logistics of the Program;
- b. **COMPLETE** the *Internal or External Lawyer Mentoring Agreement* at 2civility.org/programs/mentoring/ (your Program Administrator may want a hard copy as well); and
- c. **DEVELOP** your [Mentoring Plan](#) with your mentoring partner (see pages 4-6).

The *Mentoring Plan* is intended to serve as a guide or roadmap for the mentor and mentee relationship. It lists action items grouped by the five areas of the professional responsibility requirements in Illinois Supreme Court Rule 794(d): Professionalism, Legal Ethics, Civility, Diversity & Inclusion, and Wellness, Mental Health & Addiction.

As a pair, you should incorporate as many of the action items as feasible into your *Mentoring Plan* and customize your plan to the particular practice setting, individual needs, and personal goals of the mentee. To satisfy the requirements of the mentoring program and receive CLE credit, your completed Plan must include at least one activity from each of the five categories. Note that there are blank lines in each category where you can designate your own activity.

Together, you and your mentoring partner should develop a personalized plan for the one-year mentoring term by discussing the specific action items in the attached Plan, deciding upon the concepts, skills, topics, and shared professional experiences you'd like to address during the one-year mentoring term.

□ 2. Participate in a minimum of eight (8) face-to-face mentoring sessions.

Once you have agreed upon your Plan, you will hold a minimum of eight (8) in-person meetings over the course of the one-year mentoring term. Again, you must complete at least one activity from each of the five areas of professional responsibility requirements over the course of these meetings.

Some suggestions to enhance your mentoring experience:

- a. The particular action items or activities you select are not set in stone. To the extent interests, needs, or opportunities change during the course of the mentoring relationship, you can agree to add or substitute an activity you may not have initially selected.
- b. Consider putting your first few meetings on your calendars today; this will get you off to a strong start.
- c. To facilitate the dual purpose of education and relationship-building, we recommend neither rushing to complete the action items in a shorter time period, nor waiting until the end of the one-year term.

- d. See the corresponding section of the [Mentoring Plan Supplement](#) for additional information on a particular action item. The Supplement suggests activities, discussion topics and references for each action item in the *Mentoring Plan*.

□ **3. Complete the online requirements at the end of your year-long mentoring term.**

As your mentoring year comes to a close, on or after the anniversary date of your Orientation, all mentors and mentees must:

- a. **COMPLETE** the *Plan Completion Attestation* at 2civility.org/programs/mentoring/ (your Program Administrator may want a hard copy as well); and
- b. **COMPLETE** the brief year-end Mentoring Survey required by the Commission that accompanies the Attestation.

Thereafter, mentors and mentees may complete the *Mentoring CLE Application* at 2civility.org/programs/mentoring/ to obtain **six (6) hours of Professional Responsibility CLE credit** under Supreme Court Rule 795(d)(11). Please note that no partial credit will be given. You should receive a certificate of completion via email within 1-5 business days of submission.

Thank you again for participating, and for your contributions to professionalism in Illinois. We at the Commission hope that you will find the Program rewarding!



Mark C. Palmer
Professionalism Counsel
Illinois Supreme Court Commission on Professionalism
mark.palmer@2civility.org

1. Professionalism

Elected	Plan Supplement	Action	Completion Date
	1A	Introduce mentee to other lawyers in the community, in a variety of practice areas, through attendance at bar association (national, state, local and affinity) meetings and other networking opportunities.	
	1B	Meet at the local courthouse(s) and make appropriate introductions to members of the judiciary, court personnel and clerks of court. Discuss customary rules of civility or etiquette among lawyers and judges in the community.	
	1C	Acquaint mentee with access to justice issues, various Illinois legal services organizations, and opportunities to engage in <i>pro bono</i> activities. If appropriate, work together on a pro bono matter, charitable event, or public service project.	
	1D	Discuss law office management matters: <ol style="list-style-type: none"> a. Time records. b. Records of client-related expenses. c. Billing system. d. Conflict check procedure. e. Client retainer and/or payment schedules. f. Fee agreements. g. Escrow and trust account, establishing an IOLTA, accounting, auditing, use of interest proceeds, proper procedures for handling client funds and other property. h. Filing system and procedures. i. Document retention plan. j. Calendar reminder systems. k. Information technology system. l. Methods of keeping clients informed about progress of their matters. m. Library and research systems. n. Other resources (publications, seminars, equipment). 	
	1E	Discuss effective time management skills and techniques.	
	1F	Discuss how to staff a large litigation or transactional matter, including what is involved in effectively allocating firm and client resources.	
	1G	Discuss importance of client communication, how to maintain appropriate ongoing communication (returning telephone calls, email) to keep clients informed.	
	1H	Discuss proper legal counseling and the duties and responsibilities of advising clients.	
	1I	If applicable, discuss how to develop business in an effective and professional manner.	
	1J	Discuss types of alternative dispute resolution such as mediation, arbitration, early neutral evaluation, summary jury trials, and collaborative representation.	
	1K	Observe one of the proceedings referred in 1J. Discuss and evaluate what was observed.	
	1L	If you work in a government setting, introduce the mentee to respective roles of other agencies, and to representatives thereof.	
	Alternative Action		
	Alternative Action		

2. Legal Ethics

Elected	Plan Supplement	Action	Completion Date
	2A	Discuss practices to maintain client confidentiality.	
	2B	Discuss how to screen for, recognize, and avoid conflicts of interest.	
	2C	Discuss roles and responsibilities of paralegals, secretaries and other office personnel, and how to establish good working relationships with support staff and colleagues.	
	2D	Discuss the responsibilities of the client and the lawyer in decision-making, and the best ways to involve a client in their case.	
	2E	Discuss preparation and proper behavior during discovery.	
	2F	Discuss how to prepare for negotiation of a legal matter, when and how negotiation is initiated, how to involve the client, ethical and professionalism obligations of negotiators, skills needed to be an effective negotiator and how to acquire them.	
	2G	Discuss common malpractice and grievance traps in your practice area or setting, and how to recognize and avoid common pitfalls.	
	2H	Discuss potential resources and procedures for dealing with complicated ethical issues, including conflict of interests.	
	2I	Discuss appropriate ways to handle situations where lawyer believes another lawyer has committed an ethical violation; the obligation to report misconduct; and the appropriate way to handle a situation where a new lawyer is asked by a senior member of the firm/organization to do something that is unethical or unprofessional.	
	2J	Discuss the grievance process and a lawyer's duty to cooperate with a disciplinary investigation.	
	2K	Attend a public hearing at the ARDC's Chicago or Springfield office (see ILARDC hearings schedule) and discuss the proceedings.	
	Alternative Action		
	Alternative Action		

3. Civility

Elected	Plan Supplement	Action	Completion Date
	3A	Discuss the Commission's Survey on Professionalism and how issues of incivility impact the legal profession and the administration of justice.	
	3B	Discuss the professional conduct duties of the lawyer to the client and to the administration of justice.	
	3C	Discuss strategies for managing incivility and highly charged situations.	
	3D	Discuss how to deal with a "difficult" client.	
	Alternative Action		

4. Diversity and Inclusion

Elected	Plan Supplement	Action	Completion Date
	4A	Develop an awareness of diversity and inclusion issues in the legal profession by reading recent published studies and articles, and discussing them.	
	4B	Discuss personal experiences involving diversity and inclusion in your academic or work setting/s.	
	4C	Discuss what your organization or employer has done, or could do, to increase diversity and inclusion.	
	4D	Attend a diversity awareness or training workshop or CLE, and discuss.	
	Alternative Action		
	Alternative Action		

5. Wellness, Mental Health and Addiction

Elected	Plan Supplement	Action	Completion Date
	5A	Discuss various career paths such as large firm, small firm, government and non-profit practice, corporate counsel, and nontraditional legal positions and identify resources for exploring options.	
	5B	Discuss long term and short-term career objectives and identify ways to achieve them.	
	5C	Discuss strategies for finding a balance between career and personal life, keeping daily stress in perspective, reconciling job expectations with actual experience and maximizing career satisfaction.	
	5D	Discuss prominence of substance abuse and mental health issues in the legal profession; review warning signs of substance abuse or mental health problems; what to do if the mentor, mentee, a colleague, or a superior is faced with a substance abuse or mental health problem; and the resources for assistance.	
	Alternative Action		
	Alternative Action		