

Group Mentoring Plan 2009-2010
Francis J. Carney

	<i>Completed</i>
1. Introduction to the Legal Community	
The Mentor should contact the New Lawyers as soon as practicable after receipt of the notice of assignment and arrange to meet as a group to get acquainted. At that time or another, the Mentor should introduce the New Lawyers to other lawyers.	✓
Invite the New Lawyers to attend a meeting of the local bar association and discuss local, state and national bar association opportunities.	✓
Introduce, as feasible, the New Lawyers to other lawyers in the community through attendance at local bar association meetings or otherwise.	✓
Arrange for the New Lawyers to tour a local courthouse(s) and, to the extent practicable, introduce him or her to members of the judiciary, court personnel and clerks of court.	✓
Acquaint the New Lawyers with Legal Aid, Legal Services, and opportunities for lawyers in private practice to engage in pro bono activities.	✓
Listservs and blogs	✓
2. Professionalism and Civility	
Discuss any "unwritten" customary rules of civility or etiquette among lawyers and judges in the community.	✓
Utah Rules of Professionalism and Civility	✓
3. The Players- Utah State Bar/Utah Courts/Federal Courts	
Utah State Bar and its Sections and Committees	
Office of Professional Conduct	
Utah State Courts	
Administrative Office of the Courts	

United States District Court	
Tenth Circuit	
Speciality Bar Associations	
4. Introduction to the Community at Large	
Invite the New Lawyers to attend a civic club of which the Mentor is a member or some other community service activity in which the Mentor participates.	
Discuss civic, charitable, and service opportunities in the community.	
5. Introduction to Law Office Management	
Time Records	✓
Records of client-related expenses	✓
Billing system	✓
Escrow or Trust Account and handling of clients' funds	✓
Filing System	✓
Document Retention Plan	✓
Calendar and "Tickler" or Reminder Systems	✓
Information Technology Systems	✓
Library and Research Systems	✓
Other resources (publications, seminars, equipment, etc.) that a New Lawyers might find particularly helpful in his or her work	✓
Discuss practices to maintain client confidentiality	✓
Getting along with staff	✓
Firm "etiquette" and protocols	✓
Discuss 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	✓

Discuss good time management skills and techniques	✓
6. Dealing with the Stresses of the Legal Practice	
Background	
Lawyers Helping Lawyers	
Other resources	
7. Working With Your Clients	
Discuss topical questions and cover items of practical guidance including responsibilities of the attorney and the client in decision making.	
Discuss how to gather information about a legal matter and appraise credibility and trust.	
Discuss how to screen for, recognize and avoid conflicts of interest.	
Discuss how to decide whether to accept a proffered representation.	
Discuss how to talk about and set the fee for legal services.	
Discuss how to deal with a "difficult" client.	
Discuss "DO's and DON'TS" of maintaining good ongoing client relations, such as returning telephone calls and keeping client informed about matters.	
Discuss terminating the lawyer-client relationship and necessary documentation.	
If possible, observe a client interview or client counseling session.	
Discuss the use of retainer or engagement letters and defining the scope of the representation.	
8. Working with Opposing Counsel and Judges	
Lawyers	
Judges	

9. An Introduction to the Courtroom and Litigation	
FJC Materials	
Overview- How to Take a Case From Start to Finish	
Pleadings	
Discovery	
Motions	
Trial	
10. The Realities of Legal Writing	
Real life vs. law school	
Memoranda	
Appellate briefs	
Transactional documents	
11. Closing and Transactional Work	
Arrange for the New Lawyers to observe a real estate or other business transaction or financial closing and explain relevant background.	
12. The Obligations of Attorneys to Others	
Discuss CLE programs that may be applicable to this section.	
Discuss each provision of the Utah Standards of Professionalism and Civility and how a lawyer can use the law and legal process as "instruments for the common good."	
13. Negotiation	
Discuss topical questions and cover items of practical guidance learned from the continuing legal education ("CLE") programs attended, if applicable, including responsibilities of the attorney and the client in decision, if applicable, such as:	

-How to prepare for the negotiation of a legal matter (e.g., release of a personal injury claim, lease agreement, etc.)	
-When and how negotiation should be initiated	
-How to involve the client in negotiation	
-How to negotiate with an attorney with years of experience, a friend, etc.	
-Ethical and professionalism obligations of negotiators	
-Skills needed to be an effective negotiator and how to acquire them	
-Arrange for the New Lawyers to observe an actual or simulated negotiation and explain relevant background context and then evaluate what is observed.	
Discuss CLE programs that may be applicable to this section.	