

Introduction to the Legal Community

- The new lawyer should contact the mentor as soon as practicable after receipt of the mentoring match and arrange to meet at the mentor's office to get acquainted and discuss an appropriate mentoring plan. **(Required)**
 - (Mentor's Initial)
- During the initial meeting, or shortly after the initial meeting, the mentor should introduce the new lawyer to other lawyers and staff members at the mentor's office or ascertain that such introductions have already occurred. **(Required)**
 - (Mentor's Initial)
- Invite the new lawyer to attend a meeting of the local bar association (CLE, event, pro bono, social) and discuss advantages of involvement with local, state and/or national bar or professional associations. **(Required)**
 - (Mentor's Initial)
- Introduce, as feasible, the new lawyer to other lawyers in the community through attendance at local bar association meetings or otherwise. **(Optional)**
 - (Mentor's Initial)
- Escort the new lawyer on a tour of the local courthouse(s) and, to the extent practicable, introduce him or her to members of the judiciary, court personnel, and clerks of court. **(Optional)**
 - (Mentor's Initial)
- Acquaint the new lawyer with And Justice For All, including Legal Aid, Utah Legal Services, Disability Law Center, and opportunities for lawyers in private practice to engage in pro bono activities or have the new lawyer report on a visit with someone closely connected to these services. **(Required)**
 - (Mentor's Initial)

Required Section 2

Rules of Professional Conduct and Standards of Professionalism and Civility

- Review and discuss the Rules of Professional Conduct. Review and discuss at least two of the following Rules. **(Required)**
 - 1.7-8. Conflict of interest: current clients
 - 3.3. Candor toward the tribunal
 - 4.2 Communication with persons represented by counsel
 - 4.3 Dealing with unrepresented persons
 - (Mentor's Initial)
- Review and discuss the Utah Standards of Professionalism and Civility. Discuss the Preamble and all twenty standards. Discuss any "unwritten" customary rules of civility or etiquette among lawyers and judges in the community. **(Required)**
 - (Mentor's Initial)
- Discuss ethical issues that arise with some regularity in the practice setting. Discuss ways to resolve the issues, referring to experience, as well as the Rules of Professional Conduct. Include in the discussion the importance and use of an in practice or firm conflict resolution committee. Review and discuss the importance of and methods used to screen for potential conflicts. Discuss the differences between issue conflicts and client conflicts. **(Required)**
 - (Mentor's Initial)

Required Section 3

Litigation and Transaction Handling Experiences

- Participate in a trial in a civil or criminal case in either a state or federal court.
 - (Mentor's Initial)
- Participate in an evidentiary hearing in a state or federal court.
 - (Mentor's Initial) (Completed during law school)
- Observe or participate in a mediation or arbitration.
 - (Mentor's Initial)
- Observe or participate in a negotiation and explain relevant background context.
 - (Mentor's Initial) (Completed during law school)
- Participate in the interviewing of a client.
 - (Mentor's Initial) (Completed during law school)
- Participate in trial preparation and observe or participate in a trial.
 - (Mentor's Initial) (Completed during law school)
- Participate in or observe an appellate argument in the Utah Supreme Court, Utah Court of Appeals or in a Federal Appellate Court.
 - (Mentor's Initial)
- Participate in preparing settlement documents, including a discussion on any tax implications in a settlement including a monetary award.
 - (Mentor's Initial)
- Participate in drafting, amending, or reviewing a contract.
 - (Mentor's Initial)
- Participate in drafting a pleading or motion for an administrative body or a state or federal court.
 - (Mentor's Initial)

Required Section 4

Introduction to Law Office Management (Required for Private Practice)

Not Applicable

Required Section 5

Working with Clients (Required Where Applicable)

- Engage in a training discussion about client interaction, including tips for gathering information about a legal matter and appraising the credibility and trust of a potential client. **(Required)**
 - (Mentor's Initial)
- Train, through discussion and client interaction, how to screen for, recognize, and avoid conflicts of interest. **(Required)**
 - (Mentor's Initial)
- Train on how to decide whether to accept a proffered representation. **(Optional)**
 - (Mentor's Initial)
- Train on using retainer or engagement letters and discuss frequent issues that arise regarding the scope of representation. **(Required)**
 - (Mentor's Initial)
- Train on how to talk about and set the fee for legal services. Review and discuss retainer agreements. **(Optional)**
 - (Mentor's Initial)
- Discuss how to deal with a "difficult" client and how to decline representation of the unrealistic or "impossible" client. **(Optional)**
 - (Mentor's Initial)
- Discuss "DOs and DON'Ts" of maintaining good ongoing client relations, such as returning telephone calls and keeping clients informed about matters. **(Required)**
 - (Mentor's Initial)
- Discuss terminating the lawyer-client relationship and necessary documentation. **(Required)**
 - (Mentor's Initial)
- Participate in or observe at least one client interview or client counseling session. **(Optional)**
 - (Mentor's Initial)
- Review and understand contingency fee agreements and issues to be included. **(Optional)**

Required Section 6.

Public Service, Bar Programs, and Life Balance

- Discuss the importance of family and life balance, including any billable hour requirements not previously discussed. **(Optional)**
 - (Mentor's Initial)
- Discuss internal policy on performing public service, low and pro bono projects, and hours allowed for these programs. **(Required)**
 - (Mentor's Initial)
- Reach an understanding on how matters designated as confidential by the new lawyer will be handled. **(Required)**
 - (Mentor's Initial)
- Discuss and explain CLE requirements and ways to fulfill such requirements, including Bar CLE programs. **(Optional)**
 - (Mentor's Initial)
- Review and discuss Bar sections and committees and the value of getting involved in Bar activities and service. **(Optional)**
 - (Mentor's Initial)
- Review and discuss the support and counseling available for the new lawyer and family through the Bar's contract with a professional counseling service and the Lawyers Helping Lawyers Committee. **(Required)**
 - (Mentor's Initial)

Elective Sections

Within each area, select as many activities as feasible

Elective Section 1 **Administrative Law**

- Discuss the Utah Administrative Procedures Act and the notable differences with the Federal APA.
 - (Mentor's Initial)
- Review the appeals process for administrative adjudications under Utah law.
 - (Mentor's Initial)
- Participate in or observe an informal and formal administrative hearing.
 - (Mentor's Initial)
- Review a letter to a constituent or party to an administrative hearing instructing them of their rights to an appeal pursuant to applicable Utah law.
 - (Mentor's Initial)

Elective Section 2

Duties of the Governor's Office of General Counsel

- Participate in and discuss the budgetary process within the Governor's Office and the Governor's Office of Planning and Budget and the Legislature.
 - (Mentor's Initial)
- Discuss the General Counsel's relationship and interaction with the Legislature, agencies, courts and the Attorney General's office.
 - (Mentor's Initial)
- Participate in negotiations or consultations with Legislative General Counsel.
 - (Mentor's Initial)
- Discuss the General Counsel's role in emergency operations and review relevant constitutional and statutory duties.
 - (Mentor's Initial)
- Review and discuss Utah election law and the Governor and General Counsel's role in the initiative process. Draft a legal analysis of an initiative petition.
 - (Mentor's Initial)
- Discuss the Governor and General Counsel's role in the judicial appointment process including reviewing applications, discussing appropriate interview questions and analyzing an applicant's legal knowledge and background.
 - (Mentor's Initial)
- Participate in a discussion about a response to a Government Records Access and Management Act (GRAMA) request. Review exceptions to public disclosure requirements. Consult a client regarding the disclosure of records per a records request.
 - (Mentor's Initial)
- Discuss open and public meeting requirements.
 - (Mentor's Initial)

Elective Section 3

Lobbying Requirements, Ethics and State Legislative Process

- Review and discuss the legislative process generally, i.e., how a bill becomes a law.
 - (Mentor's Initial)
- Prepare a legal analysis of a bill and advise a client.
 - (Mentor's Initial)
- Track a bill through the legislative process to ensure all legal requirements are met.
 - (Mentor's Initial)
- Review lobbyist rules, and ethics requirements for employees of the executive branch of state government.
 - (Mentor's Initial)

Elective Section 4
Constitutional Law

- Review and discuss separation of powers issues within Utah state government. Review Article V of the Utah Constitution and applicable case law. Discuss areas of government where separation of powers issues may arise.
 - (Mentor's Initial)
- Review and discuss authority the Utah Constitution grants to all branches of government with particular emphasis on the executive branch and its interplay with the other branches of government. This may include a review of the Governor's veto powers, duties as commander-in-chief, and authority to call special sessions, etc.
 - (Mentor's Initial)
- Participate in drafting documents pursuant to the Governor's constitutional duties, such as a veto letter, or an executive order calling a special session of the legislature.
 - (Mentor's Initial)
- Review and discuss the State's authority and limitations under federal constitutional provisions.
 - (Mentor's Initial)

Elective Section 5

The Office of Risk Management and its Role in State Government

- Discuss generally, the Office of Risk Management's role in state government and its interaction with other agencies including the Office of the Governor. Specifically discuss coverage analysis, the claims process and the Attorney General's representation in litigation.
 - (Mentor's Initial)
- Discuss generally, insurance defense law and its application to civil suits brought against the State.
 - (Mentor's Initial)
- Review governmental immunity and statutory caps on claims against the State.
 - (Mentor's Initial)
- Discuss the Office of Risk Management's settlement authority limits, and those of the Governor and Legislature.
 - (Mentor's Initial)
- Observe or participate in a motion or trial related to a civil action brought against the State.
 - (Mentor's Initial)
- Observe an appeal in a civil action against the State, and observe or participate in discussions about an appeal of a civil action against the State.
 - (Mentor's Initial)
- Observe discussions between the Attorney General's office and the Office of Risk Management regarding coverage issues and litigation strategy on specific cases.
 - (Mentor's Initial)
- Observe or participate in loss control training.
 - (Mentor's Initial)
- Review and discuss a defined contract.
 - (Mentor's Initial)
- Review and discuss a certificate of insurance.
 - (Mentor's Initial)