



## ***MENTORING PROGRAM***

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*Resources for a successful mentorship experience!*

## **TABLE OF CONTENTS**

|                                         |       |
|-----------------------------------------|-------|
| INTRODUCTION .....                      | 3     |
| ACKNOWLEDGMENTS .....                   | 3     |
| PROCEDURAL OVERVIEW .....               | 4-5   |
| GETTING STARTED: MENTEE CHECKLIST ..... | 6     |
| GETTING STARTED: MENTOR CHECKLIST ..... | 7     |
| INITIAL MEETING GUIDE .....             | 8     |
| MENTORING PLAN .....                    | 9     |
| MENTORING PLAN FORM .....               | 10    |
| FREQUENTLY ASKED QUESTIONS .....        | 11-12 |
| CERTIFICATE OF COMPLETION .....         | 13    |
| CONTACT US .....                        | 14    |

## **INTRODUCTION**

The first years of a lawyer's practice are a critical time in the development of professional habits, practices and character. This period can also be challenging and stressful as new lawyers adjust to the pressures of practice management, client relations and the adversarial process.

A successful mentorship relationship can help facilitate this transition into the practice of law. A mentorship relationship can also help more experienced lawyers see the profession through new, enthusiastic eyes and help the mentor understand generational differences. The Ready.Set.Practice. Mentoring Program is designed to assist a mentor in mentoring new lawyers (the "mentee"), acting as a coach or guide as the mentee adjusts to the practice of law.

Throughout this program, the mentee and mentor will develop a Mentoring Plan. The purpose of the Mentoring Plan is to start the conversation between the mentee and mentor while giving mindful direction to the relationship. It allows the pair to identify what assistance the mentee is seeking from his or her mentor.

The success of any mentoring program depends on the commitment of both the mentor and the mentee. We are confident that mentors and mentees alike will benefit from this program.

## **ACKNOWLEDGMENTS**

This handbook is modeled on the Oregon State Bar's New Lawyer Mentoring Program Manual. We are grateful to the OSB for sharing its mentoring resources.

A special thanks to the University of Wisconsin Law & Entrepreneurship Clinic professors and students, especially Anne Smith, Clinic Co-Director, Rebecca Burkes and Forrest Crawford, for their assistance in drafting this manual and developing the Ready.Set.Practice. Mentoring Program, and to WILMIC for their sponsorship and support.

## PROCEDURAL OVERVIEW

### TIMELINE

|                   |                                                                                                                                                                                                                                              |
|-------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| September-October | Members enroll in the program.<br>Deadline is October 15th                                                                                                                                                                                   |
| November-December | Match Mentors and Mentees                                                                                                                                                                                                                    |
| January           | Webinar Training.<br><a href="https://www.wisbar.org/formembers/membershipandbenefits/Pages/Ready-Set-Practice-Training-Video.aspx">https://www.wisbar.org/formembers/membershipandbenefits/Pages/Ready-Set-Practice-Training-Video.aspx</a> |
| January-December  | Pairs hold initial meeting and begin mentor relationship Outreach, support, and surveys will be conducted to elicit feedback and suggestions from participants throughout the year                                                           |

### ENROLLMENT

Members interested in participating in the Ready. Set. Practice. Mentoring Program can submit an information sheet (accessible at [www.wisbar.org/mentoringprogram](http://www.wisbar.org/mentoringprogram)).

Currently, Wisconsin does not require new lawyers to participate in a mentoring program or grant CLE credit for mentoring.

### DURATION

The program runs during the calendar year – January through December. Meetings between the mentor and mentee are determined by the pair's schedule.

### DESIGNING THE MENTORING PLAN

The Mentoring Plan includes core concepts and experiences that will introduce mentees to the practical aspects of lawyering. See pages 10-11 for the Mentoring Plan.

During the initial meeting, the mentee and the mentor should review the required elements of the Mentoring Plan.

The Mentoring Plan may include as many practice area activities as the mentee and mentor agree are practical, but it is recommended that the plan include at least ten (10) activities – five

(5) from the core curriculum activities and five (5) from the practice area activities.\*

**\*The activities listed in this handbook are not exclusive;** the mentee and mentor may choose to supplement the listed activities or substitute others that they identify as basic competency skills. Similarly, if the mentee is interested in a substantive area for which no activities are suggested, the mentee and the mentor may customize the Mentoring Plan to build basic skills in that area.

The mentor alone is not expected to personally address all of the Mentoring Plan elements, but rather serve as a conduit to the larger legal community for the mentee. If the mentor knows a member of the community particularly well-suited in one area, he or she can arrange for the mentee to work with that individual on an item.

#### **COMPLETING THE MENTORING PLAN**

The Mentoring Plan should be completed in approximately one year. It is expected that the mentee and mentor will meet regularly and allow sufficient time to review and discuss the various experiences and activities that make up the Mentoring Plan.

Mentees may choose to complete some of the activities in small group settings rather than by individual discussion. Similarly, programs offered through sections, divisions, local or specialty bars, may be used to address some of the activities found in the Mentoring Plan.

#### **MATERIALS DESIGNED TO MAKE PARTICIPATION AS EASY AS POSSIBLE:**

- A. Mentee Checklist, see pg. 6
- B. Mentor Checklist, see pg. 7-8
- C. Initial Meeting Guide, see pg. 9
- D. Mentoring Plan Form, see pg. 10

#### **ETHICAL CONSIDERATIONS**

Ensure that you are familiar with The Rules of Professional Conduct. Be mindful of confidentiality and conflict of interest issues when participating in your mentoring relationship. For more information on ethical considerations, the program strongly recommends each participant watch the Ready.Set.Practice. webinar training videos, which are available online at <https://www.wisbar.org/formembers/membershipandbenefits/Pages/Ready-Set-Practice-Training-Video.aspx>.

## GETTING STARTED: MENTEE CHECKLIST

Sometimes the hardest step is just getting started. The checklist below will help ensure you are prepared for your initial meeting with your mentor. Remember: this relationship is a two-way street. It's important that you put in the legwork to get the most out of your mentor's time. Take initiative and be flexible.

### Complete these Steps Prior to Initial Meeting:

- Review the Initial Meeting Guide (see pg. 8);
- Mentees are encouraged to watch the Webinar Training videos at <https://www.wisbar.org/formembers/membershipandbenefits/Pages/Ready-Set-Practice-Training-Video.aspx>;
- Contact your mentor to set up the initial meeting;
- Think about areas you would specifically like to develop further (i.e. client development, time management, courtroom skills);
- Identify core curriculum concepts that interest you;
- Identify practice area activities that interest you;
- Research your mentor to learn about him or her.

### REMEMBER:

A mentoring relationship should **not** be viewed as the following:

- An opportunity to ask for employment, however, asking for career advice is acceptable.
- An opportunity to discuss current cases, however, asking for help with skill development is acceptable.

## GETTING STARTED: MENTOR CHECKLIST

The checklist below will help ensure you are prepared for your initial meeting with your mentee. The mentee is responsible for contacting you and setting up the initial meeting. If you have not heard from your mentee by mid-January, please reach out to them.

### Complete these Steps Prior to Initial Meeting:

- Review the Initial Meeting Guide (see pg. 8);
- Mentors are encouraged to watch the Webinar Training videos at <http://www.wisbar.org/formembers/membershipandbenefits/Pages/Ready-Set-Practice-Training-Video.aspx>; and
- Identify anything you would like to learn from your mentee.

### REMEMBER:

- You have a wealth of information to share. Think back to what helped you most along your career path. Share what you learned, mistakes you made, strategies for success and things you wish you would have done.
- There is so much that lawyers do not learn in law school. Share practical tips you have learned along the way that will help your mentee acquire skills to be a better professional.
- Listen to your mentee's questions. Work to foster a learning environment where he or she feels comfortable asking questions.
- Introduce your mentee to lawyers, judges, and others in the legal community. It is your professional network that will be instrumental in providing another type of learning opportunity to your mentee.
- Your mentee may want to learn about areas in which you have no experience. Reach out to others to assist your mentee.
- If you encounter a situation where a lawyer may need additional support, contact the State Bar's WisLAP program. WisLAP is designed to help lawyers, judges, law students and their families by offering services that promote physical, mental and emotional health. It is based upon lawyers helping other lawyers. The program provides free, confidential assistance in improving or maintaining health and wellbeing whether coping with substance abuse or dependence, mental health challenges, or other stressors which negatively impact the quality of life and/or the practice of law. Starting out in the practice of law can be as challenging as it is exciting. Don't hesitate to get a free consultation from this program. It is the smart thing to do.

## INITIAL MEETING GUIDE

| WHAT                                  | MENTOR                                                                                                                                                  | MENTEE                                                                                                                                   |
|---------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------|
| COME PREPARED                         | Learn what you can about your mentee prior to the initial meeting.                                                                                      | Learn what you can about your mentor prior to the initial meeting.                                                                       |
| DEFINE GOALS                          | Listen. Ask questions.                                                                                                                                  | Come prepared with several key goals, for your career and mentoring year.                                                                |
| SHARE CAREER STORY                    | Briefly share your career story, including a discussion about your mentors. If you did not have mentors, discuss how it affected your practice.         | Listen. Ask questions.                                                                                                                   |
| DISCUSS GOALS/NEEDS                   | Be prepared to adjust your expectations to meet the specific needs of your mentee.                                                                      | Give thought in advance to what you want out of the program and how to communicate that to your mentor.                                  |
| SET EXPECTATIONS AND BOUNDARIES       | Agree on general time expectations, preferred communication, etc. Part of your role is to be available for unexpected challenges that face your mentee. | Agree on preferred communication practices and time expectations. Be respectful of your mentor's time limitations.                       |
| ESTABLISH REGULAR MEETING TIMES       | Inform your mentee of your time commitments and general schedule; agree on a method and frequency for communication between scheduled meetings.         | Commit to organizing your time so as to make efficient use of mentoring meetings. Be considerate of your mentor's schedule.              |
| PREPARE THE MENTORING PLAN            | Review the plan components. Discuss the mentee's practice area interest and any adjustments to meet his or her individual needs.                        | Review the plan in advance and be prepared to discuss your practice area choice and any other goals you have for the relationship.       |
| AGREE TO BE CANDID ABOUT ANY PROBLEMS | Explain that you will inform the mentee if a problem arises in the mentoring relationship, or if a desired result is not being achieved.                | Explain that you will inform the mentor if a problem arises in the mentoring relationship, or if a desired result is not being achieved. |

## **MENTORING PLAN**

The following pages contain the Mentoring Plan, suggested core curriculum area activities, and suggested practice area activities. The mentor and mentee should consider these pages when filling out the Mentoring Plan. The pair should select at least ten (10) activities to complete during the mentoring program – five (5) core curriculum activities and five (5) practice area activities. Mentors and mentees are encouraged to be broad, expansive and creative in how they select the ten activities.

Further, it is not the expectation that the mentor directly lead each and every experience outlined in the Mentoring Plan. The mentor assures that the mentee gains access to people and professionals that will support his or her career goals, and reinforce development of a professional, ethical and competent law practice. Quite frequently, mentees may get more value out of exploring key concepts with someone more directly involved or knowledgeable about that area. For example, in a large firm, understanding of billing practices or trust account management may be handled by the accounting department, with the mentor simply confirming that the curriculum element was addressed.

## MENTORING PLAN FORM

The Mentoring Plan should be filled out and agreed upon during the initial meeting. The pair should discuss what each hopes to gain from the relationship and discuss activities that will further their legal development.

Fill out the Mentoring Plan with ten (10) activities to accomplish throughout the mentoring program. Please note, this list may change as the relationship continues throughout the year. The purpose of the Mentoring Plan is to start the conversation between the mentee and mentor while giving mindful direction to the relationship.

| ACTIVITY | DATE COMPLETED |
|----------|----------------|
| 1.       |                |
| 2.       |                |
| 3.       |                |
| 4.       |                |
| 5.       |                |
| 6.       |                |
| 7.       |                |
| 8.       |                |
| 9.       |                |
| 10.      |                |

## FREQUENTLY ASKED QUESTIONS

### **1. Is the Ready.Set.Practice. Mentoring Program Mandatory?**

No. While all newly admitted members of the State Bar of Wisconsin are encouraged to take advantage of mentoring and the opportunities presented by a formal mentoring program, participation is not mandatory.

### **2. Who are the mentors?**

Mentors are Wisconsin Bar members in good standing who have at least five years of experience in the practice of law, who have not been disciplined, who have a reputation for competence and conducting themselves ethically/professionally, and who carry professional liability insurance.

### **3. How are mentors selected?**

Potential mentors may be nominated by other mentors, volunteer, or be specifically recruited by a mentee. Mentors who fill out an enrollment form, found on [www.wisbar.org/mentoringprogram](http://www.wisbar.org/mentoringprogram), and agree to the terms and qualifications of the program, will be available to be matched with a mentee.

### **4. Do mentors get any special training?**

Yes. A webinar training is available for mentors to view at their leisure at <http://www.wisbar.org/formembers/membershipandbenefits/Pages/Ready-Set-Practice-Training-Video.aspx>. Additionally, mentors and mentees should refer to this manual for support or contact the State Bar of Wisconsin Ready.Set.Practice. Coordinator, Karen Beall at [kbeall@wisbar.org](mailto:kbeall@wisbar.org) with any questions.

### **5. How do I find a mentor?**

A new lawyer fills out the mentee enrollment form and will be matched with a mentor based off of common career goals, practice area, and/or location. If the new lawyer specifically requests a mentor who has a similar identity, such as race or gender, this will be taken into consideration during the matching process as well.

### **6. Does my mentor have to be a lawyer in my firm?**

No. Generally, lawyers employed in law firms, corporate legal departments, and government offices may be matched with a mentor in the same firm or office; however, new lawyers may also request an “outside” mentor. This decision rests with the new lawyer. Some may choose the expediency of working within the law firm while others may find value in having outside mentoring, as a supplement to the value of their firm relationships.

## **7. Can I choose my own mentor?**

We ask that new lawyers trust the matching process to be paired with the mentor that can best help to facilitate productive conversation, offer practical guidance, and give relevant personal and professional mentorship. The enrollment form prompts new lawyers to offer specific information on personal and professional goals and considerations so the matching process can be as successful as possible.

## **8. What if a mentor I've asked is already mentoring, but is also willing to work with me?**

Mentors are welcome to work with more than one mentee. There may even be some benefit to this group practice. In an effort to keep the quality of the mentoring relationship high, it is recommended that the mentor work with no more than two mentees at a time.

## **9. What is the Mentoring Plan?**

The Mentoring Plan is filled out by the mentor and mentee during their initial meeting. It sets out the activities the mentee will work on with the mentor during the mentoring year. This handbook contains many examples of activities for the Mentoring Plan, which must include five core curriculum activities and five practice area activities.

If a mentee wishes to focus on a substantive area not covered in the manual, the mentee and the mentor may identify basic skill activities related to that substantive area.

## **10. How much time will the Mentoring Plan require?**

The Mentoring Plan is designed to be completed in approximately twelve months if the mentee and mentor meet regularly.

## **11. What do I do if I have an issue with my mentor or mentee?**

If a mentor or mentee is not making time for regular meetings or is not providing helpful guidance, you may ask to withdraw from the mentoring relationship. Mentees are encouraged to give the relationship some time to develop and to remember that the mentor may not be able to satisfy all of the needs for support that the mentee may have. Contact the State Bar of Wisconsin Ready.Set.Practice. Coordinator, Karen Beall at [kbeall@wisbar.org](mailto:kbeall@wisbar.org) with any questions or concerns.

## **12. Do mentees receive CLE credit for participating in the NLMP?**

No. Wisconsin does not allow CLE credit for mentoring.

## **13. Do mentors receive CLE credit?**

No. Wisconsin does not allow CLE credit for mentoring.

## CERTIFICATE OF COMPLETION

By our signatures affixed below,

\_\_\_\_\_  
[Mentee's Full Name] Please print.

\_\_\_\_\_  
State Bar Number

And

\_\_\_\_\_  
[Mentor's Full Name] Please print.

\_\_\_\_\_  
State Bar Number

hereby certify that the Mentee and Mentor named above have satisfactorily completed all the requirements of the Ready. Set. Practice. Mentoring Plan, a copy of which I submitted herewith.

\_\_\_\_\_  
Mentee's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Mentor's Signature

\_\_\_\_\_  
Date

## CONTACT US

Our goal is to make this a meaningful experience for both Mentee and Mentor. We are interested in your experience, your feedback and your suggestions. Throughout the course of this program, you will be receiving surveys or personal outreach from State Bar coordinators and committee members for your thoughts.

Should you have any questions as you proceed through the next year in this Mentorship Program, please contact:

Karen Beall  
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