

Instructions to Sponsoring Organizations participating in CLE Commission approved Mentoring Programs

The Commission intends that Sponsoring Organizations have the flexibility to develop and design an overall Mentoring Program that meets the basic needs and objectives that the Sponsoring Organization views as being important.

The Commission will not approve a Mentoring Program designed to provide mentoring between an Approved Mentor and a beginning lawyer who are both affiliated with the same:

- law firm,
- governmental agency, or
- corporate law department.

Sponsoring organizations are expected to develop a mentoring program that:

- Recruits a core group of Mentor Attorneys.
- Matches Mentor attorneys with beginning attorneys.
- Provides a meaningful learning experience which encompasses activities and insights into the practice of law.
- Provides in advance of the pairing of a Mentor and Beginning Lawyer an outline of the duties and responsibilities of the Mentor and Beginning Lawyer.
- Approves the goals and objectives which the mentor will be asked to meet.
- Provides training and professional supervision as needed to help the Mentor and Beginning Lawyer fulfill the responsibilities outlined.
- Assists each Mentor Attorney and Beginning Lawyer in selecting the components of a mentoring plan that will best serve them in accomplishing the goals for the Beginning Lawyer.
- Assists the Beginning Lawyer in the establishment of a new mentoring relationship with a different Mentor Attorney should the initial relationship prove unsatisfactory.

- Keeps the Commission advised of any problems which may arise during the mentoring relationship. Give the Commission feedback at the conclusion of each mentoring relationship.
- Receives acknowledgements of completion from each Mentor Attorney/Beginning Lawyer mentoring pair and reports appropriate CLE credit to the Commission.
- Assures that each beginning lawyer receives information on how to access the Commission's online standardized evaluation form (Required for CLE credit.)
- Counsels the beginning lawyer in an appropriate one-on-one setting in regard to the importance of personal feedback pertaining to the learning experience during and at the end of the mentoring experience.
- Encourage the beginning lawyer to share a career perspective as it relates to the goals and objectives of the mentoring experience.

The structure of any Approved Mentoring Program shall contain the following basic elements, in addition to any other elements developed or required by the Sponsoring Organization:

- a. A statement of the goals and objectives to be accomplished by the Mentoring Program, identifying the core purposes sought to be advanced by the Sponsoring Organization;
- b. A developed program in all areas of content required or recommended by the Sponsoring Organization, including any elective topics and those suggested for inclusion in Substantive Content of Mentoring Plan, below;
- c. Provisions permitting beginning lawyers to change mentors to a second Approved Mentor at least once during the course of the mentoring program due to the Approved Mentor or beginning lawyer leaving a firm or other practice setting, the breakdown of the mentoring relationship, or other similar reasons;
- d. Because the Approved Mentor and beginning lawyer are not permitted to be affiliated with the same law firm, governmental agency, or corporate law department,
 1. provisions prohibiting the discussion of specific legal matters during the completion of the Mentoring Plan and protecting against the risk of inadvertent disclosure of client or confidential information;

2. provisions making clear that no attorney-client relationship is established by the Mentoring Program and that communications between the Approved Mentor and beginning lawyer are not confidential; and

3. provisions designed to identify and prevent present and prospective conflicts of interest;

e. Provisions prohibiting romantic or business relationships between the Approved Mentor and beginning lawyer during the period of the mentoring relationship;

f. Provisions limiting an Approved Mentor from working with more than two (2) beginning lawyers during the course of any calendar year;

g. A final certification by both the Approved Mentor and the beginning lawyer upon completion of the Mentoring Plan that all program criteria have been completed; and

h. The designation of at least one (1) person within each Sponsoring Organization to be responsible for overseeing the ongoing operations of the Mentoring Program and to serve as a point of contact with the Commission.

CHECKLIST FOR SPONSORING ORGANIZATIONS

Please initial each item to indicate that you have completed the task.

_____ I have included a statement of the goals and objectives for the mentoring plan.

_____ I have included a statement of the core and elective topics.

_____ The Mentoring Program has provisions to allow a beginning lawyer to change a Mentor to a second Approved Mentor at least once during the course of the mentoring program due to the Approved Mentor or beginning lawyer leaving a firm or other practice setting, the breakdown of the mentoring relationship, or other similar reasons.

_____ The term of the mentoring plan is between 6 months and 1 year.

_____ The mentoring plan provides for a minimum number of meetings

_____ The mentoring program includes information about how a beginning lawyer can access the Tennessee Commission on CLE and Specialization's Online Standardized Program Evaluation Form.

_____ The mentoring program provides for evaluation of the performance of each mentor at the end of the mentoring relationship.

_____ The mentoring program provides an outline of the duties and responsibilities of the each mentor and each beginning lawyer.

_____ The mentoring program has a mechanism to provide feedback at the conclusion of each mentoring relationship.

_____ The mentoring program provides a statement of all program prohibitions and limitations including :

- a) prohibiting the discussion of specific legal matters during the completion of the Mentoring Plan and protecting against the risk of inadvertent disclosure of client or confidential information;
- b) provisions making clear that no attorney-client relationship is established by the Mentoring Program and that communications between the Approved Mentor and beginning lawyer are not confidential;

- c) provisions designed to identify and prevent present and prospective conflicts of interest;
- d) Provisions prohibiting romantic or business relationships between the Approved Mentor and beginning lawyer during the period of the mentoring relationship;
- e) Provisions prohibiting an Approved Mentor from working with more than two (2) beginning lawyers during the course of any calendar year

SUBSTANTIVE CONTENT OF MENTORING PLANS

A Sponsoring Organization shall include such topics in its Mentoring Plan as it believes will best accomplish the purposes and objectives of its Mentoring Program. The Sponsoring Organization shall develop appropriate activities and materials designed to facilitate meaningful interaction and learning in the identified areas. In addition to any elective topics designated by the Sponsoring Organization, the following subject areas are suggested as core topics to include in a Mentoring Plan.

1. Professionalism and legal ethics;
2. Civic, charitable, and pro bono activities;
3. Client communication, advocacy, and negotiation;
4. Practice management;
5. Professional development, including work with the legal community, bar associations, and court activities;
6. Leadership training;
7. Career paths and work/life balance issues; and
8. Sources of well-being and causes of mental-health and substance abuse issues for attorneys, including identification of available support networks and resources.