

THE STATE BAR OF GEORGIA

COMMISSION ON CONTINUING LAWYER COMPETENCY

OUTSIDE MENTORING MANUAL

RESOURCES FOR BEGINNING LAWYERS
IN OUTSIDE MENTORING



TRANSITION INTO LAW PRACTICE PROGRAM

To provide professional guidance and counsel to assist beginning lawyers newly admitted to the State Bar of Georgia in acquiring the practical skills, judgment and professional values necessary to practice law in a highly competent manner.

Outside Mentoring Manual

Compiled by
Transition Into Law Practice Program
(Revised 02/09)

TABLE OF CONTENTS

What If You Change Jobs?	3
Points of Contact	4
Compliance Notice and Compliance Deadline	5
Mandatory Advocacy Experiences	8
Outside Mentoring Timeline.....	10
Initial Meeting Guide	15
Frequently Asked Questions and Answers	19
Timeline – “10 Years In The Making”	31
Appendix of Forms	
- Compliance Checklist	
- Mentor Volunteer Form	
- Model Mentoring Plan	
- CLE Agreement Form	
- Mentoring Completion Certificate	
- Migration Form	

ADA COMPLIANCE NOTICE:

If you prefer to receive printed materials in an alternative format,
please contact the ADA Coordinator at: (404) 527-8700 or (800) 334-6865

What If You Change Jobs?

Your Practice Setting Determines Your Mentoring Status

If your employment status changes, your Mentoring status also changes. Administratively, the Program refers to a change from one Mentoring status to another Mentoring status as a “Migration”. The Migration request is made in writing using the Migration Form found in the Appendix of Forms in this Manual.

If you are currently in Outside Mentoring and you continue as a sole practitioner, but you wish to nominate a different Outside Mentor, you will remain in Outside Mentoring, but you need to submit the Migration Form reflecting the change in Mentoring assignment.

If you are in Outside Mentoring, and you obtain a job with a law firm or organization, your mentoring status changes to Inside Mentoring and you should nominate an Inside Mentor within your law firm or organization. See the Inside Mentoring Manual for more details at:

http://www.gabar.org/programs/transition_into_law_practice_program/beginning_lawyers/

If you are currently in Outside Mentoring and your employment status changes so that you are no longer practicing law, you should consider Inactive Status. The State Bar of Georgia website contains a discussion of the benefits of Inactive Status at: <http://www.gabar.org/faqs/#13>.

POINTS OF CONTACT:

- **For Questions About TILPP CLE Component**

**Institute of Continuing Legal Education In Georgia (ICLE):
P.O. Box 1885
248 Prince Avenue
Athens, Georgia 30603**

**Phone: 800.422.0893 (Toll Free)
Fax: 706.369.5899
Email: icle@iclega.org
Website: www.iclega.org**

- **For Questions About TILPP Mentoring Component**

State Bar of Georgia Transition Into Law Practice Program:

**State Bar of Georgia
104 Marietta Street, NW
Suite 100
Atlanta, Georgia 30303**

**Phone: 404.527.8704
Fax: 404.225.5041
Email: tilpp@gabar.org
Website: www.gabar.org**

Outside Mentoring Manual

COMPLIANCE

NOTICE

&

COMPLIANCE

DEADLINE

A Quick Program Overview

For Your Information

COMPLIANCE NOTICE FOR BEGINNING LAWYERS

Congratulations upon your admission to practice law in Georgia (or if applicable, completion of your judicial clerkship or your change from “Inactive” to “Active” status). Compliance with the mandatory Transition Into Law Practice Program (“Program”) consists of two (2) components: a continuing legal education (“CLE”) component and a mentoring component. Successful completion satisfies your mandatory CLE requirements for this calendar year and the next succeeding calendar year. (State Bar Rule 8-104 (B)(1)).

CLE Component (Regulation (1)(C)(i) to State Bar Rule 8-104 (B)): You must attend mandatory CLE activities. The exact activities depend upon your practice setting. Prosecutors or Solicitors should contact their supervisor or the Prosecuting Attorneys Council of Georgia for applicable CLE activities; Public Defenders should contact their supervisor or the Georgia Public Defender Standards Council for applicable CLE activities. All other Program participants should contact the Institute for Continuing Legal Education (“ICLE”) at www.iclega.org or 1.800.422.0893 for dates and times of applicable CLE activities.

Mentoring Component (Regulation (1)(C)(ii) to State Bar Rule 8-104 (B)): You must: (1) have a Mentor for a twelve (12) month period (mentoring periods occur from January 1st - December 31st; or from July 1st – June 30th); and, (2) satisfactorily complete, during your mentoring period, a written Mentoring Plan of Activities and Experiences which has been approved by both your Mentor and by the Program Director. To assist you in complying with the mentoring component, this Manual contains a Compliance Checklist in the Appendix of Forms.

COMPLIANCE DEADLINE

Three (3) Month Compliance Deadline: COMPLIANCE IS MANDATORY. You must complete all enrollment requirements within three (3) months from the date of your registration with the State Bar of Georgia (or if applicable, the completion of your judicial clerkship or the effective date of your change from “Inactive” to “Active” status). (State Bar Rule 8-104 (B)(1)(a)).

(Continued on Next Page)

What You Should Do Now: Complete and submit the Compliance Checklist (see Appendix of Forms) with all applicable documents. This Manual contains forms, checklists, and answers to frequently asked questions to assist you in completing the enrollment process.

NOTES:

Outside Mentoring Manual

MANDATORY ADVOCACY EXPERIENCES

State Bar Rule 8 – 104 (D)

&

Regulation (5) to State Bar Rule 8 – 104 (D)

MANDATORY ADVOCACY EXPERIENCES

1. *I have been admitted to practice and I want to appear as sole or lead counsel in a case. What do I do about the "Mandatory Advocacy Experiences" requirement? (State Bar Rule 8-104 (D) and Regulation (5) to State Bar Rule 8-104(D)).*

The type of - and the timetable for - satisfying the requirements of this Bar Rule and Regulation are between you and your Mentor, and reporting is done using the "honor system" as a part of your written mentoring plan. Recall that up to three (3) of the five (5) experiences can be attained while in law school. The other two (2) experiences are chosen by you and your Mentor, and represent a portion of your written mentoring plan.

2. *What does "lead counsel" mean for purposes of the Mandatory Advocacy Experiences requirement?*

"Lead counsel" is defined as "the attorney who has primary responsibility for making all professional decisions in the handling of the case. Regulation (1) under State Bar Rule 8-104(D).

3. *Where can I obtain more information?*

Download the "Handbook on Mandatory Advocacy Experiences" from the following link:

http://www.gabar.org/programs/transition_into_law_practice_program/beginning_lawyers/

Outside Mentoring Manual

OUTSIDE MENTORING TIMELINE

A Summary Of The
Sequence Of Events

OUTSIDE MENTORING TIMELINE

WHO	WHAT	NOTES
Beginning Lawyer	1. Receives “pass letter” and certificate of eligibility for admission to practice from Office of Bar Admissions.	
Judge	2. Administers oath of admission to practice law in Georgia to Beginning Lawyer.	
State Bar of Georgia	3. Provides TILPP enrollment information to Beginning Lawyer.	
Beginning Lawyer	4. Nominates Outside Mentor (on TILPP enrollment form). - OR - 5. Notifies Program Director that Outside Mentor is needed (on TILPP enrollment form).	
Beginning Lawyer	6. Submits State Bar registration form and TILPP enrollment form to State Bar of Georgia.	
Program Director	7. Forwards Compliance Notice and Compliance Checklist to Beginning Lawyer.	
Program Director	8. If Beginning Lawyer is unable to nominate Outside Mentor, Director assists Beginning Lawyer in locating and nominating Outside Mentor. 9. If Beginning Lawyer nominates Outside Mentor whose appointment status with Georgia Supreme Court is current, then skip to Timeline Item 17. 10. If Beginning Lawyer’s nominated Outside Mentor	

	is not currently serving as appointed Mentor by Georgia Supreme Court, then proceed to Timeline Item 10.	
Mentor Volunteer	11. Completes Mentor Volunteer Form (see Appendix of Forms). 12. Submits Volunteer Form to Program Director.	
Program Director	13. Screens volunteer for minimum qualifications. 14. Forwards volunteer's name to Georgia Supreme Court for appointment consideration.	
Georgia Supreme Court	15. Considers qualifications and, if satisfactory, appoints Mentor for one (1) year term. (Terms begin either January 1 st or July 1 st .)	
Program Director	16. Forwards Georgia Supreme Court appointment certificate to Mentor. 17. Confirms assignment of Mentor to Beginning Lawyer.	
Beginning Lawyer	18. Initiates contact with Mentor to begin mentoring activities. (It is Beginning Lawyer's responsibility to initiate contact and begin process.)	
Mentor & Beginning Lawyer	19. Convene the initial meeting. Use the Initial Meeting Guide in this Manual and the Compliance Checklist to set a timetable for devising a written Mentoring Plan and assembling all pertinent documents for submission to Program Director. (See Model Mentoring Plan in Appendix of Forms in this Manual).	
Beginning Lawyer	20. Submits Compliance Checklist and all pertinent	

	documents to Program Director.	
Program Director	21. Acknowledges receipt of materials; certifies whether or not Mentoring Plan meets minimum guidelines.	
Beginning Lawyer	22. Satisfies CLE component by attending required CLE course.	
Mentor	23. Attends Mentor Orientation CLE program (optional, not required).	
Mentor & Beginning Lawyer	24. Monitor Mentoring Plan progress. (Both have joint responsibilities to monitor the Mentoring Plan progress though out the 12-month period.)	
Program Director	25. Monitors Mentoring Plan progress. (The Director may contact either or both Mentor/Beginning Lawyer to monitor Mentoring Plan status.)	
Mentor	26. Certifies status of completion of Mentoring Component. (Mentor has sole responsibility to certify to Program Director whether or not Beginning Lawyer satisfactorily completes Mentoring Plan. See Appendix of Forms for Certification Form).	
Program Director	27. Checks Beginning Lawyer's CLE transcript for compliance with CLE component. 28. Provides Certificate of Program Compliance for Beginning Lawyers who complete both CLE and Mentoring components.	
Beginning Lawyer	29. Exits Transition Into Law Practice Program and is	

	<p>subject to CLE Rules & Regulations governing all other State Bar of Georgia members, unless exempted.</p> <p>30. Considers serving as Mentor upon attaining 5-year anniversary of admission to practice law in Georgia!</p>	
--	--	--

Outside Mentoring Manual

INITIAL MEETING GUIDE

For Use During

The Initial Meeting Between

The Outside Mentor and Beginning Lawyer

INITIAL MEETING GUIDE

WHAT	OUTSIDE MENTOR	BEGINNING LAWYER
Come prepared	Learn what you can about your Beginning Lawyer prior to your initial meeting.	Learn what you can about your Mentor prior to your initial meeting.
Tell Mentor's Career Story	Tell a brief career story, including a description of your Mentors and their lessons. If you lacked mentors, describe how it impacted your career.	Listen. Ask questions.
Discuss Beginning Lawyer's Needs	Listen. Ask Questions.	Explain your career goals, including practice areas of interest to you.
Review CLE Agreement Form (in Appendix of Forms)	Explain – clearly – what you can talk about and what you cannot talk about. Make sure Beginning Lawyer understands.	Repeat back to Mentor what you can talk about and what you cannot talk about.
Review three (3) month Compliance Deadline	Explain – clearly – that the Beginning Lawyer must complete the enrollment process by the three (3) month compliance deadline. Make sure Beginning Lawyer understands.	Acknowledge your understanding of the three (3) month compliance deadline.
Review the Compliance Checklist (in Appendix of Forms)	Determine whether or not you have submitted a Mentor Volunteer Form and are currently serving as an appointed Mentor. If you are not currently serving under a term of appointment, be prepared to execute a Mentor Volunteer Form and give it to your Beginning Lawyer for submission along with other pertinent documents.	Review the Compliance Checklist in advance. Be ready to prepare and assemble the pertinent documents.

Review the Model Mentoring Plan (in Appendix of Forms)	Explain that the Model Plan is a guide. It can be, and should be, adjusted for Beginning Lawyer's specific practice areas.	Review the Model Plan in advance. Be ready to discuss an individualized plan.
Determine Compliance with Mandatory Advocacy Experiences	Review State Bar Rule 8-104 (D), Regulation (5) following State Bar Rule 8-104, and Section E of the Model Mentoring Plan. Discuss compliance, if applicable.	Review State Bar Rule 8-104 (D), Regulation (5) following State Bar Rule 8-104, and Section E of the Model Mentoring Plan. Be prepared to discuss compliance, if applicable. Be prepared to discuss if you are eligible to claim three (3) of the five (5) experiences pursuant to State Bar Rule 8-104 (D).
Set Timetable for Submitting Compliance Checklist and applicable materials.	Set date (considering compliance deadline) for finalizing all items on Compliance Checklist and submitting all pertinent enrollment materials to Program Director.	Assume responsibility for preparing, assembling and submitting enrollment materials.
Agree on Meeting Times and Who Will Set Them	Inform the Beginning Lawyer of your schedule, generally, including convenient vs. inconvenient times to call, etc.	Agree to organize your time so as to make efficient use of the Mentoring meetings. Be considerate of Mentor's work schedule.
Agree to Be Candid About Any Problems	Explain that you will inform Beginning Lawyer if a problem arises in the Mentoring relationship, or if a desired result is not being obtained.	Explain that you will inform Mentor if a problem arises in the Mentoring relationship, or if a desired result is not being obtained.

	Areas Below Left Blank For Additional Notes:	

Outside Mentoring Manual

Frequently Asked Questions and Answers

For
Outside Mentors
And
Beginning Lawyers

FREQUENTLY ASKED QUESTIONS AND ANSWERS

PROGRAM GOAL – ENROLLMENT – RESPONSIBILITIES

1. What is the goal of the Transition Into Law Practice Program (“Program”)?

The goal of the Program is to provide professional guidance and counsel to assist Beginning Lawyers who are newly admitted to the State Bar of Georgia in acquiring the practical skills, judgment and professional values necessary to practice law in a highly competent manner. To carry out this goal, the Program will afford every Beginning Lawyer with meaningful access to an experienced lawyer equipped to teach the practical skills, seasoned judgment, and sensitivity to ethical and professionalism values that represent the best traditions and highest aspirations of the legal profession. The Program is essentially an educational program that combines a Mentoring component with a Continuing Legal Education (CLE) component.

2. How does a Beginning Lawyer enter the Program?

The State Bar of Georgia provides information about Program enrollment or exemption to all attorneys newly admitted to practice in Georgia. For more information about Program enrollment or exemption, call 404-527-8704 or email tilpp@gabar.org.

3. What are the Beginning Lawyer’s Responsibilities?

- A. To satisfactorily complete the Program’s Mentoring Component by:
- devoting the time required for this mandatory Program;
 - making themselves available to the Mentor’s guidance;
 - devising jointly with the Mentor a Mentoring Plan; and,
 - satisfactorily completing the Mentoring Plan,
- B. To satisfactorily complete the Program’s CLE component.

4. **Can a Beginning Lawyer nominate the person they wish to have appointed as their Outside Mentor?**

Yes.

CLE ISSUES

5. **Where can Beginning Lawyers find out the dates, times and locations of the required CLE programs?**

Access dates, times, locations of programs at www.iclega.org or by calling ICLE at 1-800-422-0893.

MENTOR QUALIFICATIONS

6. **What are the minimum qualifications to serve as a Mentor?**

Minimum Qualifications for Mentors are set out in Regulation (6) of State Bar Rule 8-104 (B). View this Regulation, and all other State Bar Rules and Regulations on the State Bar of Georgia website www.gabar.org.

The qualifications of prospective Mentors are screened by the Program Director. The names of prospective Mentors satisfying minimum qualifications are forwarded to the Supreme Court of Georgia for consideration.

7. **Why are Mentors required to have minimum levels of professional liability insurance, or the equivalent?**

Serving as a Mentor in the Transition Into Law Practice Program is not an ordinary volunteer opportunity - it is a Supreme Court appointment. Therefore, it is appropriate to view minimum levels of professional liability insurance coverage as one factor in assessing whether or not a potential Mentor handles the business management of their law practice in a responsible manner.

8. **What does “equivalent” mean as used in “Certify that he or she has professional liability insurance with minimum limits of \$250,000.00/\$500,000.00, or its equivalent?”**

“Equivalent” refers to those Mentors covered as an employee under a policy related to their practice setting with a law firm or corporate entity; as well as those Mentors employed by government entities eligible for immunity status.

OUTSIDE MENTOR SELECTION

9. How is an Outside Mentor nominated?

A Beginning Lawyer is asked to nominate his or her own Outside Mentor. The Beginning Lawyer may direct a potential Outside Mentor to the following link on the State Bar of Georgia website containing full information about serving as an Outside Mentor:

http://www.gabar.org/programs/transition_into_law_practice_program/volunteer_to_serve_as_a_mentor/

The nomination must be approved by the Program Director (“Director”).

A Beginning Lawyer who, for whatever reason, is unable to identify an Outside Mentor notifies the Director, using the enrollment form. The Director, working with the Standards of the Profession Committee (“Committee”), will draw upon their knowledge of potential Mentors in proximity to the Beginning Lawyer as well as seek assistance from local judges, and from local, circuit, or voluntary bar associations.

In the event no Mentor can be found for a Beginning Lawyer to act in a one-on-one basis, then the Director will assign the Beginning Lawyer to a Mentoring Group in that vicinity or region of the state. A Mentoring Group will consist of an approved Mentor or group of approved Mentors who work with a small group of Beginning Lawyers through periodic group mentoring meetings in accordance with established Program criteria.

10. What are the Outside Mentor’s Responsibilities?

- A. To devote the time required for this assignment;
- B. To guide and to teach the Beginning Lawyer practical skills, seasoned judgments, and sensitivity to ethical and professionalism values;
- C. To devise jointly with the Beginning Lawyer a Mentoring Plan;
- D. To monitor the Beginning Lawyer’s Plan progress; and,
- E. To certify, at the end of 12 months, whether or not the Plan was satisfactorily completed.

11. What criteria are used in matching an Outside Mentor and a Beginning Lawyer?

The Director, working with the Committee, will draw upon their own knowledge of potential Mentors in proximity to the Beginning Lawyer as well as seek assistance from local judges and from local, circuit, or voluntary bar associations. Beyond geographic proximity, the Program will attempt, but cannot guarantee, to match Beginning Lawyers and Outside Mentors based on other criteria, such as similarities of practice area.

MENTOR ORIENTATION OPPORTUNITIES

12. Is the Mentor Orientation CLE program required?

The Mentor Orientation is not required, but mentors are strongly urged to attend the live course or to arrange a subsequent video rental through ICLE.

The Mentor Orientation is a three-hour program created by ICLE and currently offered live at the State Bar Building in Atlanta and simulcast to the South Georgia office in Tifton. Each Mentor who takes the Mentor Orientation will receive three (3) hours of complimentary CLE credit, including one (1) hour of Ethics, and one (1) hour of Professionalism. Mentors who have attended the Mentor Orientation in one year are not required to repeat it if they serve as Mentors in subsequent years.

Access dates, times, locations of Mentor Orientation Programs at www.iclega.org or by calling ICLE at 1-800-422-0893.

13. What is included in the ICLE Mentor Orientation CLE program?

The ICLE Mentor Orientation program presents information that Mentors need to know about the operation of the Program, including an overview of the CLE for Beginning Lawyers and topical questions to assist the mentor in taking the lessons presented in the classroom back into the practice setting. The lessons from the CLE for Beginning Lawyers form the basis of the discussions for the Mentors and Beginning Lawyers. Mentoring skills are also covered in the Mentor Orientation.

WHAT OUTSIDE MENTORS CAN DO AND WHAT OUTSIDE MENTORS CANNOT DO

14. **What kind of advice is an Outside Mentor allowed to offer to a Beginning Lawyer?**

All Outside Mentors and Beginning Lawyers are required to sign the Transition Into Law Practice Program Continuing Legal Education Pledge & Agreement (See “CLE Agreement Form” in Appendix of Forms in this Manual).

According to the terms of the CLE Agreement, the Outside Mentor is an educational resource for the Beginning Lawyer, and the purpose of the mentoring component of the Program is to provide opportunities for the discussion of general issues confronted by the Beginning Lawyer in the practice of law.

Moreover, the Beginning Lawyer agrees neither to ask the Outside Mentor for case specific advice nor to give to the Outside Mentor actual names of clients. The Outside Mentor and Beginning Lawyer further agree to deal with any problems the Beginning Lawyer has in only a general, hypothetical manner.

15. **Are communications between the Outside Mentor and the Beginning Lawyer confidential?**

No. The Beginning Lawyer shall not reveal to the Outside Mentor any confidential communications between the Beginning Lawyer and the Beginning Lawyer’s client, according to the terms of the CLE Agreement that Outside Mentors and Beginning Lawyers are required to sign.

16. **What is the Outside Mentor’s role in supervision of the Beginning Lawyer?**

An Outside Mentor cannot be expected to supervise the practice of law by the Beginning Lawyer.

The role of the Outside Mentor is to offer the Beginning Lawyer extended education in learning the ways of law practice. An Outside Mentor is expected to provide instruction in practical skills, as well as ethical and professionalism issues frequently encountered by lawyers in practice.

Neither the Program nor the Outside Mentor assumes any responsibility to the Beginning Lawyer’s clients for legal services performed by the Beginning Lawyer, according to the CLE Agreement.

17. **What is the Outside Mentor's role in evaluation of the Beginning Lawyer?**

The Outside Mentor assumes no responsibility for evaluating the work of the Beginning Lawyer.

The role of the Outside Mentor is to assist the Beginning Lawyer in developing practical skills, good legal decision-making and sensitivity to ethical and professionalism values. The Outside Mentor has a joint responsibility (with Beginning Lawyer) for evaluation of the mentoring relationship, but sole authority for assessing whether or not the Beginning Lawyer has satisfactorily completed the mentoring component of the Program.

MANAGING THE OUTSIDE MENTORING RELATIONSHIP

18. **During the twelve (12) month mentoring period, does the Outside Mentor initiate contacts with the Beginning Lawyer or should the Beginning Lawyer initiate contacts?**

This is a matter to be addressed and worked out between the Outside Mentor and the Beginning Lawyer.

19. **How much time is an Outside Mentor expected to spend with the Beginning Lawyer?**

The Mentor and Beginning Lawyer are expected to spend sufficient time to carry out the Mentoring Plan mutually agreed upon. While regular meetings are suggested, the Program does not specify the number or length of meetings. For an outside mentorship, one personal meeting a month, in addition to frequent telephone and email contact, is suggested to maintain the mentorship.

20. **How long does a Beginning Lawyer have to complete the Program?**

A Beginning Lawyer is required to complete the Mentoring component within twelve (12) months.

A Beginning Lawyer is required to complete the CLE component of the Program in the year of admission to the State Bar of Georgia or in the next calendar year.

THE MODEL MENTORING PLAN

(See Appendix of Forms in this Manual for a copy of the Model Mentoring Plan)

21. What is the Model Plan of Mentoring Activities and Experiences?

The intent of the Program is to create a synergy between the CLE component and the mentoring component. To assist Mentors and to help insure some structure and uniformity, a Model Plan of Mentoring Activities and Experiences is provided.

This Model Plan features a list of suggested experiences and topical questions that the Mentor and Beginning Lawyer can draw on to customize a Mentoring Plan that fits their particular needs and circumstances. With the exception of the Mandatory Advocacy Experiences for those Beginning Lawyers who appear as sole or lead counsel in the Superior or State Courts of Georgia in any contested civil case or in the trial of a criminal case, the other experiences listed in the Model Plan are not mandatory. They are illustrative of the types of experiences deemed useful in helping a Beginning Lawyer acclimate to practice and grow into a competent practitioner.

Using the Model Plan as a guide, the Mentor and Beginning Lawyer should jointly devise a Mentoring Plan for the coming twelve months, sign it, and submit it to the Program Director as an attachment to the Compliance Checklist.

Although great flexibility in designing each particular plan is warranted, the plan should foster discussion and implementation of professional skills and values. **At a minimum, the Mentoring Plan must include the following key elements:**

- A. Regular contact and meetings between the Mentor and Beginning Lawyer.
- B. Continuing discussions between the Mentor and Beginning Lawyer on at least the following topics:
 - (i) Ethics and professionalism.
 - (ii) Relationships with clients, other lawyers (both in and outside the firm), the judiciary and the public, including unrepresented parties.
 - (iii) Professional work habits, organizational skills and practice management.

(iv) Economics of practicing law in the relevant practice setting.

(v) Responsibility and opportunities for pro bono work, bar activities, and community service.

C. Introduction to the local legal community.

D. Specific planning for professional development and continuing legal education in and outside the firm.

E. Periodic evaluation of the Mentor-Beginning Lawyer relationship.

22. How is the Mentoring Plan monitored?

Monitoring of the Mentoring Plan is a joint responsibility of the Mentor and Beginning Lawyer that continues throughout the mentorship so that at the end of the twelve months, the Mentor is able to certify that the Beginning Lawyer has satisfactorily completed the Plan.

CERTIFYING COMPLETION OF THE PROGRAM

23. How does an Outside Mentor certify to the Program Director that the Beginning Lawyer has satisfactorily completed the Mentoring Component of the Program?

Use the Certification Form found in the Appendix of Forms in this Manual.

24. What happens if the Beginning Lawyer does not complete the Mentoring Plan in the required time period?

The penalty for failure to complete the Mentoring Plan will be to complete a Rehabilitation Plan approved by the Program Director, the Standards of the Profession Committee, and the Commission on Continuing Lawyer Competency, or to attend one session of the State Bar's Ethics School, offered twice yearly, once in Atlanta and once in Tifton at the Bar offices.

CHANGING MENTORS

25. What happens if the Beginning Lawyer needs to change to a different Mentor?

Administratively, the Program refers to a change from one Mentor to another Mentor as a “Migration”. The Migration request is made in writing using the Migration Form found in the Appendix of Forms in this Manual.

Neither the Beginning Lawyer nor the Mentor is required to report the reason for a Migration request.

CHANGES IN THE MENTORING RELATIONSHIP

26. What happens if the Outside Mentor becomes unavailable to serve?

The Outside Mentor shall inform the Director as soon as practicable. In the event the Outside Mentor is unable to do so, the Beginning Lawyer shall notify the Director of the situation.

In all situations, completion of a full year of mentoring is strongly to be preferred. Decisions regarding how and whether to reconstitute a mentorship because of the inability of an Outside Mentor to continue will be made by the Director, using a rule of reason. The decision will be made on a case-by-case basis, taking into consideration individual circumstances and what has or has not been achieved during the original mentorship.

The Standards of the Profession Committee has the ultimate authority and responsibility for policies and procedures for situations where a mentorship ends prematurely.

27. What happens if the Beginning Lawyer becomes unavailable to continue to be mentored by the originally assigned Outside Mentor?

The Beginning Lawyer shall inform the Director as soon as practicable. In the event the Beginning Lawyer is unable to do so, the Outside Mentor shall notify the Director of the situation.

In all situations, completion of a full year of mentoring is strongly to be preferred. Decisions regarding how and whether to reconstitute a mentorship because of the change in a Beginning Lawyer’s status will be made by the Director, using a rule of reason. The decision will be made on a case-by-case

basis, taking into consideration individual circumstances and what has or has not been achieved during the original mentorship.

The Standards of the Profession Committee has the ultimate authority and responsibility for policies and procedures for situations where a mentorship ends prematurely.

28. How will the Program deal with problems that arise in the mentoring relationship?

For problems which may arise within the context of the mentoring relationship, both the Outside Mentor and the Beginning Lawyer have a responsibility to be candid, but respectful toward one another and to seek to resolve problems in good faith where possible. Each party should inform the other of problems arising in the mentoring relationship, or if a desired result is not being obtained. An Outside Mentor or Beginning Lawyer who fails to resolve problems should convey his or her concern to the Director, who will seek the assistance of the Standards Committee if necessary to resolve the issue.

For concerns about Program requirements or procedures in general, an Outside Mentor or Beginning Lawyer should convey such concerns to the Director, who will seek the assistance of the Standards Committee if necessary to resolve the issue.

Appeals from decisions of the Standards Committee will be made to the Commission on Continuing Lawyer Competency.

ADMINISTRATIVE ISSUES

29. Who pays for the Program?

The costs of administration of the Mentoring component and subsidization of the CLE component of the Program are funded by the State Bar of Georgia. For the entire Transition Into Law Practice Program, each Beginning Lawyer will pay only the regular CLE fee for the twelve-hour CLE component.

30. How is the Program administered?

The Program is operated under the auspices of the Commission on Continuing Lawyer Competency ("CCLC") pursuant to its general supervisory authority to administer the continuing legal education rules. The Standards of the Profession Committee is a committee of the CCLC with responsibilities for devising

and recommending policy to the CCLC as to the operation of the program, serving as a Mentor Advisory Board, serving as faculty in the CLE courses, overseeing and supporting Mentoring Groups, and introducing the Program to law students, law firms, and other employers.

The Program is staffed by a Program Director and Administrative Assistant, who work under the supervision of the State Bar of Georgia, the CCLC, and the office of the Chief Justice's Commission on Professionalism.

31. How many other States have mandatory programs for newly admitted attorneys like Georgia's Transition Into Law Practice Program?

None.

Georgia is being closely watched by other State Bars, and is considered a model for mandatory mentoring programs. In addition to administering the Program for Georgia's Mentors and Beginning Lawyers, Program officials routinely field questions from other states - and other countries - about Georgia's Transition Into Law Practice Program.

32. How long did it take to develop the "Transition Into Law Practice Program?"

10 years. See "Timeline – 10 Years In The Making" in this Manual.

NOTES:

Outside Mentoring Manual

10 Years in the Making

A brief timeline showing the development of the
Transition Into Law Practice Program.

TRANSITION INTO LAW PRACTICE PROGRAM TIMELINE - 10 YEARS IN THE MAKING

1996

State Bar of Georgia creates Standards of the Profession Committee with charge to investigate and report to Board of Governors as to whether the State Bar should require beginning lawyers to complete a period of internship or other supervised work prior to admission.

1997

Standards of the Profession Committee recommends Pilot Project to test the feasibility of a transition into practice program combining mentoring with continuing legal education.

1998 – 1999

Pilot Project logistics are planned and funding secured.

2000 – 2001

State Bar conducts 2-year Pilot Project with 100 mentors and 100 beginning lawyers.

2002

Pilot Project is evaluated as successful in conveying to beginning lawyers the practical skills and professional values necessary to practice law in a highly competent manner.

2003

Standards of the Profession Committee formally recommends a mandatory Transition Into Law Practice Program that combines mandatory mentoring with continuing legal education for newly admitted lawyers in Georgia.

Board of Governors of State Bar of Georgia approves the concept of a mandatory Transition Into Law Practice Program and authorizes the Standards of the Profession Committee to propose an Implementation Plan.

2004

Supreme Court of Georgia approves the concept of a mandatory Transition Into Law Practice Program and authorizes the Standards of the Profession Committee to propose an Implementation Plan.

Standards of the Profession Committee prepares Implementation Plan.

Board of Governors approves Implementation Plan.

2005

Supreme Court of Georgia approves Implementation Plan calling for mandatory Transition Into Law Practice Program to commence January 1, 2006.

QUOTATION:

Sometimes the struggle for something that is worthwhile makes it all the better, once you achieve it.

- Harry S. Truman

Outside Mentoring Manual

APPENDIX OF FORMS

For
Outside Mentors
And
Beginning Lawyers

Outside Mentoring Manual

COMPLIANCE

CHECKLIST

Complete and Submit This Checklist As
Your Cover Pages For
All Applicable Enrollment Documents



COMPLIANCE CHECKLIST

BEGINNING LAWYER MUST
COMPLETE AND RETURN THIS CHECKLIST TO:
STATE BAR OF GEORGIA
TRANSITION INTO LAW PRACTICE PROGRAM ("TILPP")
104 Marietta Street, NW – Suite 100
Atlanta, Georgia 30303

• 1 – BEGINNING LAWYER INFORMATION (*Initial and complete "A" and "B"*)

Initial

_____ A. MY NAME IS: (*Print or Type*) _____

_____ B. MY GEORGIA BAR NUMBER IS: _____

• 2 – THREE (3) MONTH COMPLIANCE DEADLINE (*Initial "A"*)

_____ A. I understand **COMPLIANCE IS MANDATORY**. I must complete all enrollment requirements within three (3) months from the date of my registration with the State Bar of Georgia (or if applicable, the completion of my judicial clerkship or the effective date of my change from "Inactive" to "Active" status). (State Bar Rule 8-104 (B)(1)(a)).

• 3 – MENTOR NOMINATION (*Initial "A" and "B" and complete*)

_____ A. MY MENTOR'S NAME IS: (*Print or Type*) _____

_____ B. MY MENTOR'S GA BAR NUMBER IS: _____

• 4 – MENTOR VOLUNTEER FORM (*Initial "A" or "B" and attach document, as applicable*)

_____ A. MY MENTOR HAS ALREADY SUBMITTED A MENTOR VOLUNTEER FORM
(*You do not have to attach a copy of the volunteer form*)

-- OR --

_____ B. MY MENTOR'S ORIGINAL VOLUNTEER FORM IS ATTACHED
(*Attach the original notarized form, not a copy. The form may be found at:
www.gabar.org/programs/transition_into_law_practice_program*)

NOTE: THIS IS PAGE ONE (1) OF A TWO (2) PAGE CHECKLIST

NOTE: THIS IS PAGE TWO (2) OF A TWO (2) PAGE CHECKLIST

• 5 – MENTORING PLAN (Initial “A” and “B” and attach document(s), or initial “C”, as applicable)

_____ A. MY MENTORING PLAN, APPROVED BY MY MENTOR, IS ATTACHED
(Attach copy of plan – for a sample, view the Model Mentoring Plan at:
www.gabar.org/programs/transition_into_law_practice_program)

_____ B. MY MENTOR AND I HAVE BOTH SIGNED THE ATTACHED MENTORING PLAN
(Your signatures evidence your mutual pledges to satisfactorily complete the plan)

-- OR --

_____ C. I AM EMPLOYED WITH AN ORGANIZATION WITH A MASTER MENTORING PLAN
APPROVED BY TILPP (e.g. Prosecutor; Solicitor; Public Defender; Associate in Large Firm)
(You do not have to attach a copy of your organization’s plan)

• 6 – FOR SOLE PRACTITIONERS ONLY (Initial “A” and attach document)

_____ A. MY OUTSIDE MENTOR AND I HAVE BOTH SIGNED THE ATTACHED “CONTINUING
LEGAL EDUCATION AGREEMENT FORM”
(Attach original form, not a copy – this form may be found in the Manual for Outside
Mentoring at: www.gabar.org/programs/transition_into_law_practice_program)

• 7 – CERTIFICATION (Must be signed – NOTARY IS NOT REQUIRED)

I HEREBY CERTIFY that the above information is correct and complete,

Sign and Date: _____

Your original signature is required; this form cannot be submitted electronically or via fax.

Do not submit this checklist until you have completed all items and attached all pertinent documents. Incomplete or incorrect submissions will be returned.

Outside Mentoring Manual

MENTOR VOLUNTEER FORM

Use This Form To
Volunteer To Serve
As A Mentor



RETURN ORIGINAL (DO NOT FAX OR EMAIL) TO:
State Bar of Georgia
 Transition Into Law Practice Program
 104 Marietta Street, NW – Suite 100
 Atlanta, Georgia 30303



MENTOR VOLUNTEER FORM

• SECTION 1 – NAME, PHONE NUMBER & GEORGIA BAR NUMBER (Please complete)

Your Name: _____

Phone Number: _____ **YOUR GEORGIA BAR NUMBER:** _____

• SECTION 2 – EMAIL (We will email confirmation of our receipt of this form to the address you provide below)

Your Email: _____

• SECTION 3 – MENTOR TYPE (Please check the blank for Inside or Outside. If Outside, list practice areas)

_____ **INSIDE MENTOR.** I am willing to Mentor a Beginning Lawyer in my firm or organization.

_____ **OUTSIDE MENTOR.** I am willing to Mentor a Beginning Lawyer who is a sole practitioner. I prefer to mentor a Beginning Lawyer in the following practice areas: (list practice areas) _____.

• SECTION 4 – BEGINNING LAWYER (Please complete if you have identified a Beginning Lawyer to Mentor)

I will Mentor the following **Beginning Lawyer (insert name):** _____

Beginning Lawyer's Georgia Bar Number: _____

• SECTION 5 – CERTIFICATION, AUTHORIZATION AND RELEASE (Must be signed and notarized)

STATE OF GEORGIA
 COUNTY OF _____

I, the undersigned attorney, do hereby volunteer for appointment as Mentor in the Transition Into Law Practice Program ("Program").

A. Minimum Qualifications Certification. I DO HEREBY CERTIFY that I meet all of the Minimum Qualifications set out in Regulation (6) of State Bar Rule 8-104 (B), items (i) through (vi) below, inclusive, to be eligible for appointment:

(i) Active Status. I am an active member of the State Bar of Georgia, in good standing; and,

(ii) 5 Years of Practice. I have been admitted to practice law for not less than five (5) years; and,

(iii) Professional Reputation. I maintain a professional reputation in my local legal community for competence, ethical and professional conduct; and,

NOTE – THIS IS PAGE ONE (1) OF A TWO (2) PAGE FORM

NOTE – THIS IS PAGE TWO (2) OF A TWO (2) PAGE FORM

(iv) Disciplinary Action. I have never received the sanction of disbarment or suspension from the practice of law in any jurisdiction, nor have voluntarily surrendered my license to practice law for the purpose of disposing with a pending disciplinary proceeding in any jurisdiction. During the ten (10) years preceding the nomination as mentor, I have not been otherwise sanctioned by the pertinent entity governing the admission and practice of law in any jurisdiction. I understand that "sanctioned" means subjected to disciplinary action. (Thus, in Georgia, "sanctioned" currently means any of the levels of discipline whether public or confidential listed in State Bar of Georgia Rule 4-102(b) (i.e., Disbarment; Suspension; Public Reprimand; Review Panel Reprimand; Investigative Panel Reprimand; Formal Admonition); Rule 8-107 (C) (i.e., Administrative Suspension for deficiency in continuing legal education hours); or State Bar Bylaws Article I, Section 4, Item 2 (i.e., Failure to Register with State Bar of Georgia within one year upon eligibility)). I understand that nominations of individuals having formal complaint (s) pending before the Supreme Court of Georgia will be deferred until the final disposition of the formal complaint (s); and,

(v) Court-ordered Disciplinary Action. During the ten (10) years preceding the nomination as mentor, I have not been the subject of a written order issued by a court of competent jurisdiction that prohibits or otherwise limits my practice before that court or class of courts. I understand that a directive, request or order by a judge of a court requesting or directing that an attorney employed by an agency of government or a legal aid organization who is assigned to handle cases before that judge be transferred or reassigned to other duties or another courtroom does not constitute court-ordered disciplinary action under this paragraph. (NOTE: A prospective mentor who is or has within the preceding ten (10) years been the subject of such a written order may petition the Commission on Continuing Lawyer Competency (the "Commission") for a waiver of this requirement. After review of the facts and circumstances which led to the entry of such order, the Commission may, upon good cause shown, grant such waiver if the prospective mentor is otherwise qualified to be a mentor); and

(vi) Professional Liability Insurance or Equivalent. I am currently, and while serving as Mentor will remain, covered as an insured under a professional liability insurance policy with minimum limits of \$250,000.00/\$500,000.00, or, if applicable, the equivalent to such coverage through the legal status of my employer. I am aware that neither the State Bar of Georgia nor the Commission on Continuing Lawyer Competency provides professional liability insurance to Mentors in this Program. I assume sole responsibility for disclosing my participation in this Program to my professional liability insurance carrier (or, if applicable, to my employer whose legal status provides the equivalent to such coverage).

B. Authorization, Confidentiality, and Release Regarding Relevant Information. I DO HEREBY AUTHORIZE the State Bar of Georgia Office of General Counsel and any person providing information to the Program to: answer any inquiries, questions or interrogatories concerning me submitted to them by the Program or its authorized representatives; disclose complete information in any of their files; and permit the Program's authorized representatives to inspect and make copies of any complaints (including but not limited to complaints dismissed or expunged) made against me at any time whatsoever and any other records and information about or related to me. I UNDERSTAND AND AGREE that all information obtained or received in connection with my selection for and participation in the Program will be kept confidential from all other persons, firms, or corporations, including myself. I HEREBY RELEASE and exonerate the State Bar of Georgia Transition Into Law Practice Program, the State Bar of Georgia Office of General Counsel and every other person, firm, officer, corporation, association, organization or institution who provided, received, or used any information as part of my selection for and participation in the Program from any and all liability, claims, or damages of every nature and kind growing out of or in any way pertaining to providing, receiving, or using information about me in connection with selection for and participation in the Program.

C. Continuing Duty of Disclosure. I understand that the certifications I have made on this form are continuing and must correctly and fully show information sought herein as of the date of my appointment as a Mentor. I agree to notify the Program Director within ten (10) days, in writing at the return address on this form, as to any change to the information continued herein and/or of any incident that may have any bearing upon my ability to meet the Minimum Qualifications.

D. Certification of Date of Birth, Bar Number, Name. I DO HEREBY CERTIFY that my Date of Birth is _____ and my State Bar Number is _____. I understand this information is required in order to verify State Bar membership records. If appointed I wish for my name to appear on the MENTOR APPOINTMENT CERTIFICATE as follows (PLEASE TYPE OR PRINT):

IN WITNESS WHEREOF I have set my hand and seal this _____ day of _____, _____

SIGNED: _____

Subscribed before me this _____ day of _____, _____

Notary Public (SEAL)

Outside Mentoring Manual

MODEL MENTORING PLAN

**Access an editable copy of the Model Mentoring Plan at:
www.gabar.org/programs/transition_into_law_practice_program**



TRANSITION INTO LAW PRACTICE PROGRAM

Douglas Ashworth, Director

John T. Marshall, Chair
Standards of the Profession Committee

MODEL MENTORING PLAN

We, the undersigned Mentor (“Mentor”) and Beginning Lawyer (“Lawyer”) agree upon this Mentoring Plan detailing activities and experiences related to our participation in the Transition Into Law Practice Program.

We pledge that we will use our best efforts to carry out this Mentoring Plan in a manner that fulfills the purpose of the Transition Into Law Practice Program in assisting the Lawyer to acquire the practical skills, judgment and professional values to practice law in a highly competent manner. We pledge that we will devote the time and effort necessary to achieve these goals.

Print Name of Mentor & Bar No.

Mentor Signature

Date

Print Name of Beginning Lawyer & Bar No.

Beginning Lawyer Signature

Date

NOTE: This Model Plan is a guide. Mentor and Beginning Lawyer may utilize this Model Plan with no changes, or they may individualize this Model Plan to fit the practice setting of the Beginning Lawyer.

Transition Into Law Practice Program - Model Mentoring Plan

_____, Beginning Lawyer
_____, Mentor

MODEL MENTORING PLAN OF ACTIVITIES AND EXPERIENCES

The following activities and experiences are intended to serve as a guide to assist the Mentor and Beginning Lawyer in jointly developing a specific plan of activities to be completed over the course of the twelve (12) months of mentoring. The particular Mentoring Plan should incorporate as many of these activities and experiences as feasible while being adjusted to the particular practice setting and individual needs.

At the end of the mentoring year, the Mentoring Plan will serve as the Mentor's evaluative tool to determine if the Beginning Lawyer has satisfactorily completed the mentoring program. A Mentor whose area of practice is other than litigation and trial work may choose to call on another experienced lawyer who practices in this area to assist in mentoring the Beginning Lawyer in the area of the Advocacy Experiences Requirement. (Section E herein)

A cornerstone of the Program is linkage of the Mentoring component with the CLE component. The terms "Working with Your Client" (Section D.1. herein) "Acting For Your Client" (Section H.1. herein) and "Negotiating For Your Client" (Section I.1. herein) refer to topical areas which may be covered in ICLE facilitated seminars.

Transition Into Law Practice Program - Model Mentoring Plan

_____, Beginning Lawyer
_____, Mentor

ACTIVITY OR EXPERIENCE

DATE COMPLETED

A. Introduction to the Legal Community

1. The Mentor should contact the Beginning Lawyer as soon as practicable after receipt of the notice of assignment and arrange to meet at the Mentor's office to get acquainted. At that time or another, the Mentor should introduce the Beginning Lawyer to other lawyers and staff members at the Mentor's office or, in the case of in-firm mentoring; ascertain that such introductions have already occurred. _____
2. Invite the Beginning Lawyer to attend a meeting of the local bar association and discuss local, state and national bar association opportunities. _____
3. Introduce, as feasible, the Beginning Lawyer to other lawyers in the community through attendance at local bar association meetings or otherwise. _____
4. Escort the Beginning 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. _____
5. Discuss any "unwritten" customary rules of civility or etiquette among lawyers and judges in the community. _____
6. Acquaint the Beginning Lawyer with Legal Aid, Georgia Legal Services, and opportunities for lawyers in private practice to engage in pro bono activities. _____

B. Introduction to the Community at Large

1. Invite the Beginning Lawyer to attend a civic club of which the Mentor is a member or some other community service activity in which the Mentor participates. _____
2. Discuss civic, charitable, and service opportunities in the community. _____

Transition Into Law Practice Program - Model Mentoring Plan

_____, Beginning Lawyer
_____, Mentor

C.	Introduction to Law Office Management	DATE COMPLETED
1.	The Mentor should take the Beginning Lawyer on a tour of the Mentor's office and demonstrate and explain how the following items of law practice management are used and handled in the Mentor's office, if applicable.	_____
	(a) Time Records	_____
	(b) Records of client-related expenses	_____
	(c) Billing system	_____
	(d) Escrow or Trust Account and handling of clients funds	_____
	(e) Filing System	_____
	(f) Document Retention Plan	_____
	(g) Calendar and "Tickler" or Reminder Systems	_____
	(h) Information Technology Systems	_____
	(i) Library and Research Systems	_____
	(j) Other resources (publications, seminars, equipment, etc.) that a Beginning Lawyer might find particularly helpful in his or her work	_____
	(k) Discuss good time management skills and techniques	_____
	(l) Discuss practices to maintain client confidentiality	_____
	(m) 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	_____

Transition Into Law Practice Program - Model Mentoring Plan

_____, Beginning Lawyer
_____, Mentor

D. Working With Your Client

**DATE
COMPLETED**

1. 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 making. _____
2. Discuss how to gather information about a legal matter and appraise credibility and trust. _____
3. Discuss how to screen for, recognize and avoid conflicts of interest. _____
4. Discuss how to decide whether to accept a proffered representation. _____
5. Discuss the use of retainer or engagement letters and defining the scope of the representation. _____
6. Discuss how to talk about and set the fee for legal services. _____
7. Discuss how to deal with a "difficult" client. _____
8. Discuss "DO's and DON'TS" of maintaining good ongoing client relations, such as returning telephone calls and keeping client informed about matters. _____
9. Discuss terminating the lawyer-client relationship and necessary documentation. _____
10. *Participate in or observe at least one client interview or client counseling session.* _____

*** For Inside Mentors and Beginning Lawyers only.**

Transition Into Law Practice Program - Model Mentoring Plan

_____, Beginning Lawyer
_____, Mentor

E. Mandatory Advocacy Experiences

Mandatory Advocacy Experiences are required for certain Beginning Lawyers.

State Bar Rule 8-104(D) provides:

“Prior to appearing as sole or lead counsel in the Superior or State Courts of Georgia in any contested civil case or in the trial of a criminal case, any newly admitted active member admitted to practice after June 30, 2005, shall complete the mandatory Advocacy Experiences of the Transition Into Law Practice Program”

Regulation (5) following State Bar Rule 8-104(D) provides:

“(5) For participants in the Transition Into Law Practice Program who wish to appear as sole or lead counsel in the Superior or State Courts of Georgia in any contested civil case or in the trial of a criminal case, the mentors and beginning lawyers shall devise five (5) Mandatory Advocacy Experiences tailored to the practices of the beginning lawyers.”

The following are examples:

- i. An actual or simulated deposition of a witness or adverse party in a civil action;***
- ii. An actual or simulated jury trial in a civil or criminal case in either a state or federal court;***
- iii. An actual or simulated nonjury trial or evidentiary hearing in a state or federal court;***
- iv. An actual or webcast of an appellate argument in the Supreme Court of Georgia, the Court of Appeals of Georgia, or a United States Circuit Court of Appeals; and***
- v. An actual or simulated mediation.***

Other advocacy experiences may be selected by Mentors to comply with Rule 8-104(D).”

Transition Into Law Practice Program - Model Mentoring Plan

_____, Beginning Lawyer
_____, Mentor

For Beginning Lawyers subject to the mandatory Advocacy Experiences requirement, the Mentor should monitor and facilitate the progress of the Beginning Lawyer in observing five (5) Advocacy Experiences and by discussing, or arranging for another experienced lawyer to discuss, the context and assess the event observed. The five (5) experiences should be tailored to the Beginning Lawyers practice area.

REMINDER: Up to three (3) of the five (5) mandatory Advocacy Experiences may be obtained prior to admission to practice, under certain conditions. See Rule 8-104(D).

LIST MANDATORY ADVOCACY EXPERIENCES:

	DATE COMPLETED
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____

Transition Into Law Practice Program - Model Mentoring Plan

_____, Beginning Lawyer
_____, Mentor

F. Optional Advocacy Experiences

**DATE
COMPLETED**

Arrange for the Beginning Lawyer to observe an actual or simulated arbitration and discuss or arrange for an experienced lawyer to discuss the arbitration observed, provide relevant background context and evaluate what is observed.

Arrange for the Beginning Lawyer to observe a judicial-type hearing conducted by a state or local administrative body (e.g., local zoning board; tax equalization board hearing; state licensing or regulatory board) and provide relevant background context and evaluate what is observed.

G. Closing and Transactional Work

Arrange for Beginning Lawyer to observe a real estate or other business transaction or financial closing and explain relevant background.

Transition Into Law Practice Program - Model Mentoring Plan

_____, Beginning Lawyer
_____, Mentor

H. The Obligations of Attorneys to Others

**DATE
COMPLETED**

11. Discuss Topical questions and cover items of practical guidance learned from the continuing legal education ("CLE") programs attended, if applicable.
12. Discuss "A Lawyer's Creed" (see below) and how one as a lawyer can use the law and legal process as "instruments for the common good."

A LAWYER'S CREED

To my clients, I offer faithfulness, competence, diligence, and good judgment. I will strive to represent you as I would want to be represented and to be worthy of your trust.

To the opposing parties and their counsel, I offer fairness, integrity, and civility. I will seek reconciliation and, if we fail, I will strive to make our dispute a dignified one.

To the courts, and other tribunals, and to those who assist them, I offer respect, candor, and courtesy. I will strive to do honor to the search for justice.

To my colleagues in the practice of law, I offer concern for your welfare. I will strive to make our association a professional friendship.

To the profession, I offer assistance. I will strive to keep our business a profession and our profession a calling in the spirit of public service.

To the public and our systems of justice, I offer service. I will strive to improve the law and our legal system, to make the law and our legal system available to all, and to seek the common good through the representation of my clients.

Transition Into Law Practice Program - Model Mentoring Plan

_____, Beginning Lawyer
_____, Mentor

I. Negotiation

DATE COMPLETED

1. 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:
 - (a) How to prepare for the negotiation of a legal matter (e.g., release of a personal injury claim, lease agreement, etc.)
 - (b) When and how negotiation should be initiated
 - (c) How to involve the client in negotiation
 - (d) How to negotiate with an attorney with years of experience, a friend, etc.
 - (e) Ethical and professionalism obligations of negotiators
 - (f) Skills needed to be an effective negotiator and how to acquire them
2. Arrange for Beginning Lawyer to observe an actual or simulated negotiation and explain relevant background context and then evaluate what is observed.

END OF MODEL MENTORING PLAN

Model Mentoring Plan compiled by:

State Bar of Georgia
Transition Into Law Practice Program
104 Marietta Street, NW – Suite 100
Atlanta, Georgia 30303
tilpp@gabar.org

Outside Mentoring Manual

CONTINUING LEGAL EDUCATION

AGREEMENT FORM

Sign And Submit Original As Attachment To
Compliance Checklist



TRANSITION INTO LAW PRACTICE PROGRAM

Douglas Ashworth, Director

John T. Marshall, Chair
Standards of the Profession Committee

CONTINUING LEGAL EDUCATION PLEDGE & AGREEMENT

BETWEEN OUTSIDE MENTOR AND BEGINNING LAWYER

1. The undersigned Mentor ("Mentor") and Beginning Lawyer ("Lawyer") hereby agree upon the Mentoring Plan ("Plan") of activities and experiences attached hereto. (Attach Mentoring Plan as exhibit).
2. They pledge that they will use their best efforts to carry out the Plan in a manner that fulfills the purpose of the Transition Into Law Practice Program in assisting the Lawyer to acquire the practical skills, judgment and professional values to practice law in a highly competent manner.
3. They pledge that they will devote the time and effort necessary to achieve these goals.
4. The sole purpose of the advice and information furnished during the mentorship is to continue the legal education of Lawyer during his or her first year of practice by assisting Lawyer in acquiring practical skills and in deepening their understanding of ethical and professional values expected of lawyers in practice.
5. Mentoring activities shall be governed by applicable Georgia State Bar Rules and Regulations, including but not limited to Rule 8-104 (B), and related Regulations, as amended.
6. Lawyer agrees not to ask Mentor for case specific advice, and not to give to Mentor actual client names. Lawyer understands that neither State Bar, nor Program, nor Mentor warrants or represents that any information or advice that may be imparted to Lawyer is to be acted on or relied upon by Lawyer in handling a specific matter for a client. Lawyer agrees not to and disclaims any right to rely upon the continuing legal education provided through the Program by Mentor, by State Bar, and/or Program with respect to any acts or omissions to act, in which Lawyer might engage.
7. This Agreement shall be governed by and construed in accordance with the law of the State of Georgia.
8. No client of Lawyer's nor any other third person, firm or corporation shall be a beneficiary of this Agreement.
9. This Agreement shall not be altered or amended except by written agreement authorized by the State Bar and the Program, respectively.

Print Name of Mentor & Bar No.

Mentor Signature

Date

Print Name of Beginning Lawyer & Bar No.

Beginning Law Signature

Date

**RETURN SIGNED ORIGINAL OF
THIS DOCUMENT TO:**

**State Bar of Georgia
Transition Into Law Practice Program
104 Marietta Street, NW – Suite 100
Atlanta, Georgia 30303**

Outside Mentoring Manual

MENTORING COMPLETION CERTIFICATE

Mentor Signs and Submits Original
to Program Director
By the end of the
Twelve (12) Month Mentoring Period



RETURN ORIGINAL (DO NOT FAX) TO:
State Bar of Georgia
Transition Into Law Practice Program
104 Marietta Street, NW – Suite 100
Atlanta, Georgia 30303



MENTORING COMPLETION

CERTIFICATION*

I hereby certify that _____
(Print/Type name and Bar Number of Beginning Lawyer)

_____ satisfactorily completed a Mentoring Plan of Activities and
(has or has not)

Experiences approved by the Transition Into Law Practice Program within twelve (12)
months as required by (Regulation (1)(C)(ii) of State Bar of Georgia Rule 8-104 (B)).

This _____ day of _____, _____.

Mentor's Name *(Please print)*

Mentor's Signature *(Notary not required)*

By the end of twelve (12) months from the start of the mentoring period, the Mentor is expected to sign this certification evidencing whether or not the Beginning Lawyer satisfactorily completed the Mentoring Plan to which they committed.

**** Transition Into Law Practice Program requires satisfactory completion of: (1) a CLE component; and, (2) a Mentoring component. This document pertains only to the Mentoring component.***

Outside Mentoring Manual

MIGRATION FORM

Used Only If Reassignment
To New Proposed Mentor Is Requested

Beginning Lawyer Completes
And
Submits To Program Director



MIGRATION FORM

BEGINNING LAWYER MUST
COMPLETE AND RETURN THIS FORM TO:
STATE BAR OF GEORGIA
TRANSITION INTO LAW PRACTICE PROGRAM ("TILPP")
104 Marietta Street, NW – Suite 100
Atlanta, Georgia 30303



• 1 – BEGINNING LAWYER INFORMATION (Initial and complete "A" and "B")

Initial

_____ A. MY NAME IS: *(Print or Type)* _____

_____ B. MY GEORGIA BAR NUMBER IS: _____

_____ C. MY EMAIL ADDRESS IS: _____

(Note: Receipt of this form will be provided via email at the address you provide above).

• 2 – PREVIOUS MENTOR INFORMATION (Initial "A" and "B" and complete, OR initial "C")

_____ A. MY PREVIOUS MENTOR'S NAME IS: *(Print or Type)* _____

_____ B. MY PREVIOUS MENTOR'S GA BAR NUMBER IS: _____

-- OR --

_____ C. I WAS IN GROUP MENTORING AND WAS NOT ASSIGNED TO AN INDIVIDUAL MENTOR

• 3 – NEW MENTOR NOMINEE INFORMATION (Initial "A" and "B" and complete)

_____ A. I WISH TO NOMINATE THE FOLLOWING INDIVIDUAL TO SERVE AS MY NEW MENTOR:
(Print or Type NEW MENTOR NOMINEE'S NAME) _____

_____ B. MY NEW MENTOR NOMINEE'S GA BAR NUMBER IS: _____

**NOTE: THIS IS PAGE ONE (1) OF
A TWO (2) PAGE FORM**

NOTE: THIS IS PAGE TWO (2) OF A TWO (2) PAGE FORM

• 4 – MENTOR VOLUNTEER FORM (Initial “A” or “B” and attach document, as applicable)

_____ A. MY NEW MENTOR NOMINEE HAS ALREADY SUBMITTED A VOLUNTEER FORM
(You do not have to attach a copy of the volunteer form)

-- OR --

_____ B. MY NEW MENTOR NOMINEE'S ORIGINAL VOLUNTEER FORM IS ATTACHED
(Attach the original notarized form, not a copy. The form may be found at:
www.gabar.org/programs/transition_into_law_practice_program)

• 5 – CERTIFICATION BY BEGINNING LAWYER (Must be signed – NOTARY IS NOT REQUIRED)

I HEREBY CERTIFY that the above information is correct and complete and I hereby request reassignment from my previous Mentor (or Group Mentoring) to my new Mentor Nominee. I understand that the TILPP Director must approve this request. I certify that I will disclose to my new Mentor Nominee the status of my completion of TILPP's Mentoring component requirements, including but not limited to, providing my new Mentor Nominee a copy of my written mentoring plan (if applicable) or such other documents as they may require.

Sign and Date: _____

Your original signature is required; this form cannot be submitted electronically or via fax.

Has Your Address Changed? State Bar Rule 1-207 Requires Members To Keep Current Address Information On File. To Change Your Address, Log Onto: www.gabar.org/member_essentials/address_change.

Do not submit this form until you have completed all items and attached all pertinent documents. Incomplete or incorrect submissions will be returned.