



New Lawyer Mentoring Program

The new [Oregon State Bar mentoring program](#) is gearing up! With [unofficial results of the February bar exam due next Friday](#), the [bar](#) is working at a fever pace to get ready.

Would you [like to be a mentor](#)? If you have at least seven years of experience, no disciplinary prosecutions pending, and a reputation for competence and professionalism, you meet the minimum qualifications. The [Oregon Supreme Court](#) will appoint mentors recommended by the [OSB Board of Governors](#). Applications are available [here](#).

Mentors and mentees will be guided by the [New Lawyer Mentoring Program Manual](#). The core of the program is the Mentoring Plan which requires mentors to introduce mentees “to practical aspects of lawyering.” The Plan includes these components:

- Introduction to the Legal Community: meeting lawyers and staff at the mentor’s office; introduction to others in the legal community; discussing and acquainting the new lawyer with community and public service, the [Campaign for Equal Justice](#), [Oregon Law Foundation](#), and [Oregon New Lawyers Division](#); escorting the new lawyer to the courthouse; and explaining the customs and etiquette of practice in the community.
- Rules of Professional Conduct, Professionalism, and Cultural Competence: discussing the lawyer’s oath, core values of confidentiality and loyalty, reviewing specific [Rules of Professional Conduct](#), including those pertaining to conflicts of interest; reviewing and discussing common ethical issues, including the duty to report; reviewing and discussing the [OSB Statement on Professionalism](#), [MCLE requirements](#), and the importance of cultural competence.
- Introduction to Law Office Management: reviewing time keeping and time management techniques; billing practices; trust accounting; malpractice coverage; introduction of calendaring protocols, tickler systems, and technology; discussing available resources for new lawyers; discussing the roles and responsibilities of legal support staff and the lawyer’s duty to supervise.
- Working with Clients: identifying your client; discussing client interactions; case and client screening; discussing the scope of representation and dos and don’ts of good client relations; participating in or observing at least one client interview/meeting; setting fees; declining or terminating representation.
- Career Satisfaction and Work/Life Balance: developing a support system; discussing career objectives and making time for family and friends; reviewing the warning signs of substance abuse and depression.

- Practice Area Activities and Skills: all mentees must complete a writing project, other requirements are specific to the practice area. Typically, reviewing and discussing court rules and real-life experience is stressed: from helping to draft an initial pleading through participating in discovery, deposition, and trial preparation.

This sounds like a fantastic program to me! And kudos to the volunteer mentors as this will clearly be a significant time commitment. If you are a mentor, or know someone who will be volunteering as a mentor, may I suggest the following resources to lighten your load:

Introduction to the Legal Community, Rules of Professional Conduct, Professionalism and Cultural Competence - direct mentees to the [Campaign for Equal Justice](#), [Oregon Law Foundation](#), and [Oregon New Lawyers Division](#) Web sites where plentiful information abounds. Learn about your local courthouse (hours, phone number, directions, map, address, Web site) [here](#). For a good overview of our state court system, see "[An Introduction to the Courts of Oregon](#)." [Court rules \(ORAP, ORCP, UTCRs, SLRs\), statutes, the state and federal constitutions, etc. are available here](#). [Ethics Home](#) on the OSB Web site is a great launching point for the [Oregon Rules of Professional Conduct](#) and other resources. Contact information for the General Counsel is [here](#) or browse the [Formal Ethics Opinion Library](#). My favorite ethics resources? The [OSB Bulletin Bar Counsel Ethics Article Archive](#) (10+ years of articles on ethics issues – hit <Ctrl> F to search the page) and *The Ethical Oregon Lawyer*. ([Login](#) and explore BarBooks to see this publication.) And don't forget [Mark Fucile's](#) "Ethics Focus" column in the [Multnomah Lawyer](#). For cultural competence, may I tout the [PLF's](#) Access to Justice CLE presented each year as part of our annual Learning the Ropes program for new admittees? Access to Justice 2010 covered multi-generational communication, recognizing mental impairments, working with impaired clients, and working with clients from different cultural backgrounds. This CLE, including the downloadable handout, is available at **no charge** on the [PLF Web site](#). From the home page, select Programs on CD/DVD under Loss Prevention – CLE.

Introduction to Law Office Management - The PLF publications, *A Guide to Setting Up and Running Your Law Office* and *A Guide to Setting Up and Using Your Lawyer Trust Account* are invaluable to new admittees. Copies are made available at each swearing-in ceremony and may also be ordered or downloaded at no charge from the [PLF Web site](#). Select Books from the PLF under Loss Prevention. For more specific tips on law office management, please direct your mentees to the PLF practice management advisors: [yours truly](#), [Dee Crocker](#), and [Sheila Blackford](#). Our services are free and confidential. We would be happy to meet with you and your mentee. May I also recommend our **free Practice Aids and Forms** which cover 42 topics including billing, trust accounting, calendaring, tickler systems, technology, and staff as well as these **free Programs on CD/DVD from the PLF Web site**:

Office Systems/Financial Management

Best Practices for Avoiding Conflicts and Maintaining Confidentiality
 Calendaring, Docketing and File Tickling Systems
 Employment Practices for Lawyers
 Ethics of Practice Management 2010
 Fee Agreements
 File Management
 Make Every Penny Count
 Money Matters

Technology

Corel WordPerfect X3 Tips
 Intro to Internet-Based Practice Management Software
 Microsoft Outlook 2007 Tips
 Microsoft Word 2007 Tips

Practical Law Office Solutions for Sole and Small Firms (Technology Fair)
QuickBooks 2007 Tips
Survival Tips for Organizing Your E-Mail and Practicing in eCourt
Time Matters Basic and Advanced
Tips, Sites, and Gadgets

On May 12, 2011 we are offering a CLE entitled **Trust Accounting: Your Financial and Ethical Responsibilities**. To register for the live program select Upcoming Seminars under Loss Prevention – CLE on the [PLF Web site](#). Register for the Web cast [here](#). Approved for 3.25 ethics credits, this CLE is \$10. Watch the [PLF Web site](#) for our upcoming June 1 **program addressing technology issues**: lawyers using iPads, the paper-less office, and practicing in the cloud. A registration form should be available shortly. Both CLEs will be recorded. You or your mentee may order the programs on CD/DVD from the [PLF Web site](#) two to three weeks after the live event.

Working with Clients – Building a Successful Practice through Improved Client Communication is another free program available from the [PLF](#) on CD/DVD. In addition, the topic of client and case screening is discussed extensively throughout our annual CLE program, Learning the Ropes, also available as a Program on CD/DVD on our [Web site](#). You may also find my [OSB Bulletin](#) articles helpful: [Make the Right Match: What If You Only Represented Clients You Liked?](#) and [How to Fire a Client: Dos and Don'ts When Ending Representation](#). Also see the chapter entitled “New Clients” in *A Guide to Setting Up and Running Your Law Office*, available on the [PLF Web site](#). Select Books from the PLF under Loss Prevention.

Career Satisfaction and Work/Life Balance – The single best resource for career satisfaction and work/life balance is the [Oregon Attorney Assistance Program](#). The [OAAP](#) has [four attorney counselors](#) at the ready to assist your mentees with issues that affect their ability to function effectively, including work/life balance. The [OAAP](#) also has terrific career transition/satisfaction resources. Services are free and confidential.

Here are just a few of the past [OAAP](#) workshops and educational programs available on the [PLF Web site](#) as Programs on CD/DVD:

Enjoying Parenting
Practicing Law with Attention Deficit Disorder
Reducing the Pressure
Road to Office Organization
Smart Isn't Enough – Improving Your Personal and Professional Effectiveness (\$25)
Strategies for Balancing Work and the Rest of Your Life
Stress Hardiness for Lawyers and Judges
Taking Care of Ourselves (While We're Busy Taking Care of Others)
What Can You Do When Someone In Your Family Experiences Depression, Anxiety, or other Health Issues
Work and Worth: Navigating Your Way in the Profession

These recorded programs are free unless otherwise indicated.

A Closing Word about Malpractice Coverage

The [Oregon State Bar](#) established the [Professional Liability Fund](#) in 1978 as the mandatory provider of primary malpractice coverage for Oregon lawyers. The primary and excess coverage plans (39 and 29 pages, respectively) are available as PDFs on the [PLF Web site](#). You will find additional resources on our [Web site](#), including answers to frequently asked questions, [PLF](#) exemption and billing guides, exclusions from coverage, and other materials under the Primary and Excess Coverage headings. Malpractice coverage issues are complex (there are 12 pages of coverage exclusions) and ever-evolving. (Recent changes to the plan address new issues such as computer data loss and “virtual practice.”) **Please**

encourage mentees to contact the Professional Liability Fund with questions or concerns. We can be reached at 503-639-6911 or 800-452-1639 (toll-free in Oregon).

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