

# LAWYERS' INSURANCE

## ASSOCIATION OF NOVA SCOTIA

### Model Mentoring Plan of Activities and Experiences

The following activities and experiences are intended to serve as a guide to assist the Mentor and Mentee 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. This is not intended to be an exhaustive list. You should add or subtract from this list to meet your own specific needs or goals.

#### A. Mentorship Plan

1. The Mentor should contact the Mentee as soon as practicable after notice of the match and arrange to meet to get acquainted, discuss goals for the year and create the mentorship plan. This should be completed within 30 days of the match being communicated.

#### B. Introduction to the Legal Community

ACTIVITY OR EXPERIENCE	DATE COMPLETED
1. Introduce the Mentee 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. Discuss the role, responsibilities and opportunities of the Nova Scotia Barristers' Society, the Lawyers' Insurance Association of Nova Scotia, as well as the Canadian Bar Association.	_____
3. Introduce, as feasible, the Mentee to other lawyers in the community through attendance at a bar association meetings or otherwise, such as the Mentorship Program noon hour sessions.	_____
4. Give the Mentee a tour of the local	

courthouse(s) and, to the extent practicable, introduce him or her to Court staff.

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5. Discuss the customary rules of civility or etiquette among lawyers and judges in the community.

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**C. Introduction to the Community at Large**

1. Invite the Mentee to attend a civic club of which the Mentor is a member or some other community service activity in which the Mentor participates.

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2. Discuss civic, charitable, and service opportunities in the community.

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**D. Introduction to Law Office Management**

1. Take the Mentee 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

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(b) Records of client-related expenses

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(c) Billing system

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(d) Trust Account and handling of clients funds

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(e) Filing System

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(f) Document Retention Plan

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(g) Calendar and "Tickler" or Reminder Systems

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(h) Information Technology Systems

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(i) Library and Research Systems

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(j) Other resources (publications, seminars, equipment, etc.) that a Mentee might find particularly helpful in his or her work.

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(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. \_\_\_\_\_

## **E. Working With Your Client**

Potential areas of discussion include:

1. Topical questions and cover items of practical guidance learned from any CLE programs attended, if applicable, including responsibilities of the lawyer and the client in decision making and how to document those discussions in your file. \_\_\_\_\_
2. How to gather information about a legal matter and appraise credibility and trust. Discuss any checklists that are available for this purpose. \_\_\_\_\_
3. How to screen for, recognize and avoid conflicts of interest. \_\_\_\_\_
4. How to decide whether to accept a client and how to say “no” where appropriate. \_\_\_\_\_
5. The use of retainer or engagement letters and how to define the scope of the representation.
6. How to talk about and set the fee for legal services. \_\_\_\_\_
7. How to deal with a “difficult” client. \_\_\_\_\_
8. “DO’s and DON’TS” of maintaining good ongoing client relations, such as returning telephone calls and keeping client informed about matters. \_\_\_\_\_
9. Terminating the lawyer-client relationship and necessary documentation. \_\_\_\_\_

## **F. Advocacy Experiences**

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

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Arrange for the Mentee to observe a judicial-type hearing conducted including an administrative body (e.g., Small Claims Court; Residential Tenancies board; Utility and Review Board) and provide relevant background context and evaluate what is observed.

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**G. Closing and Transactional Work**

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

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**H. LIANS**

Review and discuss with the Mentee the Mandatory Policy provided by the Lawyers' Insurance Association of Nova Scotia and the reporting obligations under the Policy; and discuss optional excess insurance.

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Review and discuss with the Mentee the obligations under the *Legal Ethics Handbook*.

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**DATE SIGNED:** \_\_\_\_\_

\_\_\_\_\_  
**MENTOR**

\_\_\_\_\_  
**MENTEE**