Mentoring Best Practices

1. Overview of Mentoring
   1. ABA Standards for Programs Providing Civil Legal Pro Bono Services
      1. Standard 4.8: Building Strong Relationships with Volunteers (training and Support): A program should offer training, mentoring, and supervision to its volunteers.
         1. “The provision of high quality legal services to clients should be a principal goal for programs. While it is recognized that often a program ultimately does not have control over the quality of work produced by a volunteer, there are many steps it can take to foster the provision of high quality assistance and representation by program volunteers.”
   2. Benefits of Mentoring
      1. Training and mentoring can aid in the recruitment and retention of certain types of volunteers.
         * 1. New Admittees-eager to develop knowledge in various substantive and procedural areas.
           2. Can expand the types of cases that volunteers are willing to accept by offering training and support services in areas that volunteers may not usually handle in their private practices, but would be willing to address if provided with the proper tools.
           3. Can engage attorneys who may not be willing to take a full rep case, but would be interested in serving as a mentor and answering questions.
2. Mentoring Models-General Overview
   1. Training and Support Opportunities
      1. Materials
         1. Training manuals-electronic and shared online with password
         2. Sample pleadings
      2. Trainings
         1. Live and recorded
         2. On demand beneficial because attorneys can have access later on and program doesn’t need to do the same training repeatedly
   2. Mentoring to Supplement Training
      1. Materials and expert support on an as-needed basis
         1. In-depth training manuals for various topics provided to all volunteers
         2. Office hours or brown bags-attorneys can meet with staff attorneys or pro bono volunteers with specialized knowledge to ask questions about a case and problem solve. Can structure either individual meetings or a roundtable for particular substantive area so that several volunteers can meet with more experienced mentor and discuss questions/trends together.
         3. Volunteers should be able to contact the program and know who to contact if they need assistance if they encounter a problem or have a question.
      2. Co-counseling
         1. Program co-counsels on cases with volunteer attorneys. Program staff assist with filing documents and may be on-site during any hearings to assist the volunteer attorney. May both handle various aspects of the litigation as co-counsel.
         2. Volunteer attorneys serve as mentors and have a newer volunteer paired with them to co-counsel a case. This gives the newer volunteer a resource to assist on the case and it gives the mentor assistance on aspects of the case. This model is also beneficial for new attorneys who not only learn a new area of law, but also meet another attorney to expand their network.
      3. Clinic models
         1. Staff attorneys or volunteer attorneys with expertise should be on site at clinics to help volunteers with issues as they may arise.
         2. Materials prepared before hand by pro bono staff-packets with forms and instructions provided to each volunteer.
3. Program Examples
   1. Pro Bono Mentors
      1. [Community Legal Services of Mid-Florida Peer Academy](https://www.clsmf.org/pro-bono-peer-academy/)
         1. First pilot in Bankruptcy. Volunteers receive CLE training, case support, pairing with mentors, networking, and recognition.
         2. Volunteers agree to take a full rep case and two clinics, along with participation in trainings and agree to return as a mentor for future academies.
         3. Able to engage attorneys who didn’t want to take a full rep case as mentors. Meet at least once a month at the beginning and more often as needed when move into the full representation. Mentor answers questions, reviews docs and pleadings. Also host live monthly meetings with the entire cohort participating in peer academy with special guests.
         4. Next session is a dissolution of marriage peer academy. 10 participants with 6 mentors. Most of the mentors take 2 participants. Staff attorneys record substantive trainings, volunteer attorneys serve as mentors. Incentive for participants of peer academy that they will learn the area of law well enough from this to integrate into their own practice after working with CLSMF.
         5. Using an e-learning platform for trainings so that participants can go back and watch again and so that they can use the same trainings for future peer academy groups.
         6. Will also be doing an estate planning and probate group.
      2. [Cleveland Legal Aid Act 2](https://lasclev.org/volunteer/attorneys/act-2/#:~:text=Whether%20they%20are%20scaling%20down,vulnerable%20members%20of%20our%20communities.)
         1. Emeritus attorneys serve as mentors. Structure gives them more control and structure of the relationship, unlike previous mentorship arrangements where a firm may assign the mentor and it was built into their separate employment arrangement.
         2. This gives retired attorneys many opportunities to participate in pro bono. Many of the mentors serve as in-house volunteers-they volunteer a few hours a week for specific projects or a specific substantive group.
            1. Example: attorney who assist with record-sealing. Serves as mentor to attorneys who help clients file their motions to seal records.
            2. Successful because of ownership of the project-volunteer feels ownership of the work. Does a few hours a week looking at client records and does it all from home. He helps volunteers work through any issues on these record sealing cases.
            3. Example: Social security cases. Have a full training module with an attorney available to answer questions and help with CLE trainings. Atotrney’s former work social security was area of expertise, he reviews cases and recommends what the volunteer should do. Involvement is more brief service-assessing what going to need to ask the volunteer to do and what the client’s options are. When the volunteers have questions, they reach out to that attorney.
            4. Ohio Supreme Court mentorship project for new attorneys: presents a great opportunity to bring new attorneys in. There is a requirement in that to do community service, so try to get mentors and mentees from that, which makes sense for both of the participants.
            5. Follow-up: every three months they survey volunteer attorneys to ask about their experience.
            6. For family law, they have attorneys who partipcate in clinics to talk the attorneys through issues they may run into. They can provide mentorship at brief-advice clinics.
         3. Market this to new attorneys-they always mention their mentorship opportunities in their marketing materials.
   2. Staff Mentoring/Co-Counseling
      1. [Pine Tree Legal Aid](https://www.ptla.org/)
         1. Specific to Eviction Defense. 6 staff members do training every 6 months. Pro bono staff attorney coordinates the training and mentorship-1 staff is primarily responsible for mentoring. Training is virtual and available for volunteers for later reference.
         2. Full representation eviction referrals. Pro bono staff attorney who is dedicated to training and mentoring volunteers.
            1. Any issues that come up, go to staff attorney for support. Also provide form templates on the website and materials.
            2. In court mentorship: pro bono staff attorney goes to court to act as a resource to volunteer attorneys. Volunteers can also come and shadow. If there is a court date, they will have a pro bono staff person there or staff attorney from Pine Tree to provide support to the volunteer.
         3. Friday office hours-anyone who takes a case can drop-in to office hours. Pro bono staff attorney plus one other staff will come to office hours and workshop with the volunteer attorneys. Attorneys can have questions answered and hear about other cases. Volunteers are able to learn from each other, conversations are very worthwhile.
         4. Surveying volunteers: frequently survey the volunteers to collect feedback on the trainings and mentorship. Learned that needed more forms and templates and adjusted for that.
         5. Messaging and marketing to volunteers that they are there and available for help and support.
      2. [Legal Services of Eastern Missouri](https://lsem.org/neighborhood-vacancy-initiative/)
         1. Mentoring for the Neighborhood Vacancy project. Matches neighborhood group clients with large firms. Firms make a multi-year commitment to serving community development cases such as housing development, corporate governance, clearing titles, etc.
         2. Legal Aid co-counsels on every case.
            1. Training, best practices, onboarding, and CLE programming.
            2. Program is a place-based partnership where they go into a particular community. They have MOU’s in place with the firms to outline the process-such as case types, what they are sending over, what the firm will handle and what LSEM will handle.
            3. Mentoring is internal to the firm-LSEM does more of co-counseling. The firm partners a new associate with a partner for an internal mentor and LSEM co-counsel with subject matter expertise, and the partner mentors the associate.
            4. They build individual client services around community education events and will build training around those events.
            5. Trainings are recorded and on their server. Will do refresher trainings with more detailed documents if litigation comes up. Because they are co-counseling, if anything comes up with a case, they will assist. (coverage assistance, etc.) They put together forms, samples, case files, and try to schedule meetings to answer questions if needed.
            6. Monthly check-ins with firms and clients to make sure everyone is on the same page.