



Orange County Bar Association

Mentoring Committee

Post Office Box 6130, Newport Beach, CA 92658

Telephone: 949-440-6700 Facsimile: 949-440-6710

Mentor Checklist

Before you submit your Mentor Application, please complete this checklist to confirm that you have completed all necessary steps to be considered for the OCBA Mentoring Program.

Complete and attach the following:

- I have read the Mentor Guidelines.
- I have completed the Mentor Application.
- I have completed the Mentor Participation Agreement.

After completing the foregoing checklist, mail with the requested attachments to the Orange County Bar Association Mentoring Committee:
Post Office Box 6130, Newport Beach, CA 92658.

Failure to provide all required forms and other documentation may cause a delay in processing your application.

Mentor Signature _____ Date: _____



ORANGE COUNTY BAR ASSOCIATION

Mentoring Program

Mentor Guidelines

Requirements For Mentors

- Licensed member of the State Bar of California;
- Orange County Bar Association Member;
- Read and be familiar with the OCBA Standards for Professionalism and Civility Among Attorneys;
- Practicing for a minimum of seven (7) years;
- Approval of the Orange County Bar Association Mentoring Committee;
- No record of discipline with the State Bar of California (subject to the discretion of the OCBA Mentoring Committee);
- Commit to a one-year program;
- Must be available to meet with protégé in person once per month;
- Must be reasonably available by telephone and/or e-mail to protégé;
- Complete the OCBA Mentor Volunteer Application;
- Complete the OCBA Mentoring Program Mentor Participation Agreement.

Restrictions on the Mentor-Protégé Relationship

- Mentors shall not use the Program as a method to recruit for his/her law firm or practice or obtain unpaid legal interns;
- Mentors shall not be joined as co-counsel with their protégé on client matters, shall not accept client referrals from their protégé, and shall not make any referrals to their protégé during the course of the Program;
- Mentors shall not research any substantive legal issues for nor provide any legal services to their protégé;
- Mentors should avoid even the appearance of the existence of an attorney/client relationship with their protégé's clients;
- Mentors shall treat all communications with their protégé as confidential, but should understand that such communications may not be privileged;
- Mentors shall not engage in any inappropriate conduct with their protégé. Any such conduct will result in immediate and permanent removal from the OCBA Mentoring Program.

Mentoring Activities

- Personally invite protégée to attend the Kickoff Reception and attend Kickoff Reception with protégé;
- Meet with protégé in person once per month;
- Personally invite protégé to attend least two Orange County Bar Association Events such as Section Meetings or Receptions and attend those events with protégé (the OCBA will be responsible for the payment of the protégé's fee to attend two OCBA events during the course of the Program);
- Observe protégé in court or other appropriate practice setting to the extent possible, time and circumstances permitting, and invite protégé to observe mentor in court or other appropriate practice setting to the extent possible, time and circumstances permitting;
- Lunch or Breakfast meetings. Suggested topics of conversation include:
 - Ethics and Professionalism;
 - Practice and Law Office Management;
 - Business/Client Development;
 - Networking;
 - Lawyering Skills;
 - Career Choices;
 - Issues Generally Affecting the Legal Profession;
 - Courthouse Personnel;
 - Pro Bono Opportunities;
 - How a protégée can be a valuable asset to their employer.

Suggestions for Being a Successful Mentor

- Listen;
- Be ready with topics for discussion if the protégé does not come to a meeting with questions;
- Exchange ideas rather than lecture;
- Tell "war stories";
- Make your assistant aware that you are participating in the OCBA Mentoring Program and give your assistant the name of your protégé so that the protégé's telephone calls and other communications will be easily identified and treated accordingly;
- Be prepared to discuss practical issues, especially professionalism and ethics;
- Place reminders in your calendar to contact the protégé;
- Honor scheduled meetings if at all possible.



ORANGE COUNTY BAR ASSOCIATION
Mentor Volunteer Application

Name: _____
Mailing address: _____

Telephone: _____
Email: _____
OCBA Member No. _____

1. I am a:
 member of a large firm (40+ attorneys firmwide)
 member of a medium-sized firm (10-39 attorneys)
 member of a small firm (2-9 attorneys)
 solo practitioner (see also No. 10 below)
 in-house counsel
 government attorney
 legal services attorney
 other _____

2. My work requires *(please check all that apply):*
 trial practice
 litigation
 transactional
 appellate practice
 appearance before regulatory/administrative boards
 other _____

3. My office is located in the following district:
 Harbor (Balboa, CDM, Irvine, Newport, Costa Mesa)
 Central (Tustin, El Modena, Orange, Santa Ana, Villa Park)
 West (Cypress, Fountain Valley, Garden Grove, Los Alamitos, Seal/Huntington Beach, Westminster)
 South (Aliso/Mission Viejo, Coto, Laguna, Lake Forest, San Clemente, San Juan Capistrano)
 North (Anaheim, Brea, Buena Park, Fullerton, La Habra, Yorba Linda)

4. I work in the following areas of law *(please check all that apply):*
 administrative/governmental
 bankruptcy
 business/commercial
 construction
 criminal law
 elder law
 employment/labor law
 environmental law
 family law
 general practice
 health law
 immigration law
 Indian law
 insurance defense
 intellectual property
 international practice
 juvenile law
 landlord/tenant
 personal injury/property damage
 professional liability
 real estate
 securities
 sports/entertainment law
 taxation
 wills/gifts/trusts/estates
 other: _____

5. Civic Activities:

6. Bar-related Activities:

<p>7. Additional Activities:</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>8. I prefer meeting <i>(please check all that apply):</i></p> <p><input type="checkbox"/> before work</p> <p><input type="checkbox"/> lunchtime</p> <p><input type="checkbox"/> after work</p> <p><input type="checkbox"/> other _____</p> <p>9. I prefer to communicate by <i>(please check all that apply):</i></p> <p><input type="checkbox"/> e-mail</p> <p><input type="checkbox"/> telephone</p> <p><input type="checkbox"/> letter/facsimile</p>	<p>10. For Solo and Small Practice</p> <p>I can assist in the following areas <i>(please check all that apply):</i></p> <p><input type="checkbox"/> bank or client trust accounts</p> <p><input type="checkbox"/> fee and billing practice</p> <p><input type="checkbox"/> retainer agreements</p> <p><input type="checkbox"/> marketing your practice</p> <p><input type="checkbox"/> budgeting</p> <p><input type="checkbox"/> business planning</p> <p><input type="checkbox"/> conflicts of interest and record-keeping</p> <p><input type="checkbox"/> other: _____</p> <p>_____</p> <p>11. Additional Information</p> <p>Law School: _____</p> <p>Year of Admission: _____</p> <p>Courts Admitted/Special Admissions:</p> <p>_____</p> <p>_____</p> <p>Other Professional Licenses? (CPA, MD, etc.)</p> <p>_____</p> <p>_____</p>
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Please feel free to attach a current resume.

I understand that the information provided in this application, and any additional information provided by me to the OCBA Mentoring Committee, is **not confidential** and may be shared with the members of the Mentoring Committee and my chosen protégé.

Signature: _____ Date: _____

Thank you for your participation!

Please return by email to **mentoring@ocba.net**
or Fax to (949) 440-6710 or by mail to
OCBA
Attn: Mentoring Committee
P.O. Box 6130
Newport Beach, CA 92658



ORANGE COUNTY BAR ASSOCIATION

Mentoring Program

Mentor Participation Agreement

I _____ (“Mentor”) agree to participate in the Mentoring Program conducted by the Orange County Bar Association (the “OCBA”). The purpose of the Mentoring Program, as fully described in the Guidelines that I acknowledge having received by signing below, is to provide junior lawyers with an educational and professional development resource only.

I acknowledge and agree that I will comply with each of the Guidelines that I have been provided with, including specifically my agreement that:

(1) I will make myself reasonably available to my assigned protégé during the term of our mentoring relationship;

(2) My assigned protégé is not to be employed by me or to perform work on my behalf during the term of our mentoring relationship;

(3) I will not assign work to my assigned protégé during the term of our mentoring relationship;

(4) I acknowledge and understand that I am not an employee, representative or agent of the OCBA because of my participation in this program and I will not hold myself out or give the appearance as such; and

(5) I will not engage in any inappropriate conduct with my assigned protégé.

In exchange for the opportunity to participate in the Mentoring Program, I agree on behalf of myself and my spouse, parents, children, family, partners, employees, agents, heirs, estate, executors, representatives, administrators, insurers, successors and assigns to fully release the OCBA, including its elected and appointed officers, board members, mentoring committee members, directors, employees, volunteers, mentors, protégés, agents, attorneys and any other persons or entities acting on its behalf, and each of them, from any and all claims for injury, loss, liability, professional negligence, damages, lawsuits, expenses (including, but not limited to, attorneys’ fees) and any other injury or liability to me or any other person acting on my behalf, in connection with my participation in the Mentoring Program and I agree to waive any and all rights to make any of the above claims through a lawsuit or otherwise against the OCBA and the persons provided above.

I UNDERSTAND THIS RELEASE SHALL BE EFFECTIVE EVEN IF THE LOSS, DAMAGE OR INJURY WAS NOT FORESEEABLE OR RESULTS, IN WHOLE OR IN PART, FROM THE NEGLIGENCE OF THE OCBA OR ANY OF THE OTHER RELEASED PARTIES.

By signing below, I acknowledge and represent that I have read, and I agree to fully comply with the Mentor Guidelines. Further, I acknowledge and represent that **I HAVE READ THIS AGREEMENT CAREFULLY, I FULLY UNDERSTAND ITS CONTENTS AND I VOLUNTARILY AGREE TO ITS TERMS.** No oral representations, statements or inducements, apart from this written agreement, have been made. If any portion of this agreement is declared invalid by a court, the remainder shall continue in full force and effect.

Signature: _____

Date: _____