

**COMMITTEE ON STANDARDS OF THE PROFESSION
STATE BAR OF GEORGIA**



**IMPLEMENTATION PLAN
FOR A
MANDATORY TRANSITION INTO LAW
PRACTICE PROGRAM**

August 19, 2004

State Bar of Georgia
Standards of the Profession Committee

TRANSITION INTO LAW PRACTICE PROGRAM
IMPLEMENTATION PLAN

Table of Contents

	<u>Page</u>
I. Overview of the Program	2
II. Mentors	4
III. Beginning Lawyers	11
IV. CLE Component:	13
Enhanced Bridge-the-Gap Program	
Fundamentals of Law Practice Program	
V. Mentoring Component:	18
Plan of Mentoring Activities and Experiences; Minimum Requirements; Pledge; Certificate of Satisfactory Completion;	
VI. Penalties for Failure to Complete the Program	22
VII. Introduction of the Program to Newly Admitted Lawyers and to the Bar	23
VIII. Administration, Budget and Funding	25
IX. Conclusion	33
X. Appendices	
A. Timetable for the Program	
B. Transition Into Law Practice Program Continuing Legal Education Agreement	
C. Program Agendas and Schedule for Enhanced Bridge the Gap and Fundamentals of Law Practice	
D. Syllabus for CLE Programs and Topical Questions for Use by Mentors	
E. Model Mentoring Plan of Activities and Experiences with Pledge	
F. Estimated Budgets	
G. Board of Governors Resolution August 19, 2004	

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TRANSITION INTO LAW PRACTICE PROGRAM
IMPLEMENTATION PLAN

On January 7, 2004, the Supreme Court of Georgia approved the general concept of a mandatory Transition Into Law Practice Program for adoption by the State Bar of Georgia. The Transition Into Law Practice Program would apply to all beginning lawyers admitted to the State Bar of Georgia, with specified exceptions.¹ The Standards of the Profession Committee was directed to develop an implementation plan to detail the operation of the proposed Transition Into Law Practice Program and its administration, cost and funding.

This report presents the Implementation Plan that was presented to the Board of Governors of the State Bar of Georgia and the Supreme Court in 2004. The Board of Governors approved the Plan on August 19, 2004. The resolution signifying the Board's approval of the Plan is attached as Appendix G to this report. The Implementation Plan calls for the establishment of the Transition Into Law Practice Program and the commencement of operations during calendar year 2005. A Timetable for the Program is attached as Appendix A to this report.

¹ Lawyers who enter the practice of law as federal, state, local, or other governmental employees may satisfy the requirements of the Program by participating for twelve months in an approved new lawyer mentoring program specially designed for the government office or agency under policies and procedures established by the Standards of the Profession Committee and the Commission on Continuing Lawyer Competency.

The following lawyers are not covered by the mandatory program:

1. Lawyers admitted to practice in this state who have principal practices in another state;
2. Lawyers who have been admitted to the practice of law in another United States jurisdiction outside of Georgia for two or more years prior to admission to practice in this state; and
3. Lawyers serving as judicial law clerks. These lawyers will not be subject to the mandatory program during the period of the judicial clerkship but will be covered once the clerkship ends for the first year thereafter that they engage in the practice of law in this state.

I. OVERVIEW OF THE PROGRAM

The Implementation Plan calls for the establishment of a mandatory Transition Into Law Practice Program (the "Program") for beginning lawyers in Georgia. The purpose of this one-year 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. The goal of the Program is to 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.

A Pilot Project was conducted from 2000-2002. Approximately 100 mentors and 100 beginning lawyers participated in the Pilot Project that included key features of the Program now being proposed. Evaluations of the Pilot Project support the conclusion that the Project was effective in helping to make more competent, professional lawyers.

The core of the Program is to match every beginning lawyer with a mentor for the first year after admission to the Bar. Most beginning lawyers will be paired with an experienced lawyer in the same law firm, office, or practice setting who will serve as the beginning lawyer's mentor. Beginning lawyers who do not practice in association with a lawyer who has at least five (5) years of experience and who is qualified to serve as a mentor will be matched through the Program with an outside mentor or assigned to a Mentoring Group as part of a group of beginning lawyers and mentors arranged on a regional basis.

A continuing legal education component of the Program to lay the groundwork for and support the mentoring component will be created by the Institute of Continuing Legal Education in Georgia ("ICLE"). Most beginning lawyers will attend an Enhanced Bridge-the-Gap program that combines the content and format of the current Bridge-the-Gap program with a second day of instruction focusing on the role of attorneys in

working with and counseling clients, dealing with others as representatives of clients, and negotiating for clients.

An alternative continuing legal education program, called the Fundamentals of Law Practice, will also be created. While the length and content of the instruction in this program will be substantially the same as the Enhanced Bridge-the-Gap Program, the format and setting will differ. Attendance at the Fundamentals of Law Practice Program will be limited to about 100 beginning lawyers each session. Most instruction will be offered in small groups of 12-15 persons to permit close, hands-on guidance and interaction between the corps of experienced lawyer-instructors and the beginning lawyers. Priority in attending the Fundamentals of Law Practice Program will be given to beginning lawyers who are not practicing in association with an experienced lawyer. This priority is based on the effort to replicate, as far as possible in this setting, the kind of interaction between a new attorney and an experienced attorney that occurs naturally in a law practice setting where new attorneys practice in association with experienced attorneys.

All beginning lawyers except those described in footnote 1 will participate in the Transition Into Law Practice Program, although relevant differences in law practice settings and types of practice will differentiate precisely how that participation occurs. Through the Program, beginning lawyers will be guaranteed access to experienced lawyers who will serve as mentors. By attending one or the other of the required CLE programs, they will receive instruction from experienced lawyers about how to carry out some of the key roles performed by attorneys.

Each beginning lawyer and his or her mentor should devise and develop, formally commit to and sign, and submit a plan of mentoring activities for the one-year period of the mentorship that, while adjusted to individual needs and interests, conforms to certain minimum standards. At the conclusion of twelve months, the mentor and beginning lawyer will be expected to certify that the beginning lawyer has satisfactorily completed the Mentoring Plan to which they committed.

II. MENTORS

The success of the Program depends on the willingness of experienced lawyers to commit the time to serve as mentors to assist beginning lawyers in learning how to practice law in a highly competent manner as professionals. It is both a high calling and a great responsibility to assist new members of the legal profession to gain a secure foothold in practice during that very important initial year of practice. Serving as a mentor to new members of the Bar is in keeping with the best traditions of the legal profession. It should be a matter of professional pride and personal satisfaction to have a mentoring relationship with a new lawyer just beginning the practice of law.

A. Qualifications to Serve as a Mentor

The qualifications set forth below are minimum qualifications. Before agreeing to serve as a mentor, a lawyer should consider whether he or she has the ability to guide and teach a new lawyer and has the dedication to devote the time required for this assignment. Each mentor must:

1. Be an active member of the State Bar of Georgia, in good standing;
2. Be admitted to practice for not less than five (5) years;
3. Have a reputation among judges and peers in the local legal community for competence and ethical and professional conduct.
4. Never have been sanctioned, suspended or disbarred in any state from the practice of law; and
5. Certify that he or she has professional liability insurance with minimum limits of \$250,000.00/\$500,000.00, or its equivalent.

The qualifications of prospective mentors will be screened by a subcommittee of the Standards of the Profession Committee to be known as the Mentor Subcommittee. This subcommittee will recommend mentors for appointment. The mentor must agree in writing to serve as mentor.

B. Appointment, Recruitment and Selection of Mentors

1. Appointment

Mentors will be appointed by the Supreme Court of Georgia for one-year terms. Mentors may serve more than one term.

2. Recruitment

Recruitment of mentors will be an ongoing part of the Program so long as the Program is in existence. A member of the Program's administrative staff will have the chief operational role for such recruitment. The principal recruitment will be directed toward mentors for beginning lawyers who are not practicing in a firm or office with a potential mentor who meets the above qualifications. It is assumed that firms or employers who do have potential mentors will nominate an appropriate mentor who meets all the requirements to serve as mentor for the beginning lawyer in his or her own practice setting. The Mentor Subcommittee will work with the Program Director by assisting in the identification of prospective mentors. Mentors, once recruited, may serve for an indefinite time, with Mentor Subcommittee approval and the consent of the mentor. Mentors would, however, have to be reappointed when assigned and matched with a new beginning lawyer.

3. Selection

Prior to placing a mentor on the recommendation list, the Mentor Subcommittee will have the responsibility for checking references for the mentors if they are not known by a substantial number of the members of the Mentor Subcommittee. Once mentors have passed the screening of the Mentor Subcommittee, the recommendation list will be forwarded to the Georgia Supreme Court which shall appoint mentors from the recommendation list for a renewable term of one (1) year.

(a) Firm or In-House Mentors

The assignment of mentors within a firm, office or practice group will be based on the recommendation of the firm or other employer itself, subject to the stated qualifications for appointment as a mentor and compliance with the other requirements of the Program.

(b) Outside Mentors

(1) Beginning lawyers who do not practice in association with a lawyer eligible to be appointed as a mentor will be asked to nominate their own mentors. Beginning lawyers who, for whatever reason, are unable to identify a mentor shall so notify the Program Director who, in turn, will refer the matter to the Mentor Subcommittee.

(2) The Mentor Subcommittee will draw upon its own knowledge of potential mentors in proximity to the beginning lawyer as well as seek assistance from superior/state court judges and local or circuit bar associations, including speciality/minority

bar associations, such as Gate City Bar, Georgia Association for Women Lawyers, etc.

- (3) In the event that no mentor can be found for a beginning lawyer to act in a one-on-one basis, then the Mentor Subcommittee 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 criteria established by the Mentor Subcommittee.

C. Migration of Mentors, Beginning Lawyers, and Other Turnover

Because the Program will be mandatory for all beginning lawyers, plans must be devised to deal with situations where, for various causes, the mentoring relationship ends prior to one-year. This can occur where (a) a beginning lawyer during his or her mandatory mentoring year either leaves the firm or practice setting so that he or she falls out of contact with the mentor, (b) the mentor leaves the firm or the practice setting and the beginning lawyer remains, or (c) the mentoring relationship breaks down and either the mentor or beginning lawyer deems that he or she is unable to work with the assigned mentor or beginning lawyer.

In all situations of migration and turnover, completion of a full year of mentoring is strongly to be preferred. Decisions regarding how and whether to reconstitute a mentorship because of migration and turnover will be made by the Program 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 Mentor Subcommittee will have the ultimate authority and

responsibility to adopt policies and procedures for situations where a mentorship ends prematurely and to make decisions pursuant to these policies and procedures. On occasion, the Mentor Subcommittee may serve as an appellate body for those beginning lawyers who propose a different approach than the course recommended by the Director for completing the mentorship.

D. Orientation for Mentors

An orientation program for new mentors will be offered by ICLE each year. The purpose of this program will be to provide new mentors with an overview of the Transition Into Law Practice Program and its purpose and goals and to provide useful information about effective mentoring for new lawyers. New mentors will be expected to attend one of these programs.

A three-hour Mentor Orientation Program will be presented live twice a year and will be available over the internet. The first program will be held in the late fall of 2005 and the second in the late spring or early summer of 2006. Mentors will not be charged a fee for attending the Mentor Orientation. The Program will cover the costs of these orientation and training sessions.

The Mentor Orientation Program will be designed for all mentors during the inaugural year of the Program. Thereafter, mentors who have attended the Mentor Orientation Program will not be required to repeat it in order to serve again as a mentor.

E. CLE Credit for Mentors

1. All mentors who attend one of the offerings of the Mentor Orientation Program will receive three (3) hours of CLE credit, including one (1) hour of ethics and one (1) hour of professionalism, on a complimentary basis.

2. Mentors who are mentoring beginning lawyers outside of the mentor's law firm or practice setting will receive twelve (12) hours of CLE credit, including one (1) hour of ethics, one (1) hour of professionalism and three (3) hours of trial practice on a complimentary basis. This credit will be granted for the actual year of the mentorship and may be granted for each year that a mentor is engaged in mentoring a beginning lawyer. The Program, itself, will pay the fees for the above CLE credit.

F. Recognition of Mentors

Significant recognition for each year of service should be given by the State Bar to all members who serve as mentors to beginning lawyers. Among the recognitions to be considered and determined by the Standards of the Profession Committee are the following:

1. Issuance of a special bar membership card recognizing the lawyer's service as a mentor with an indication of the number of years served;
2. Special recognition at the annual meeting of the State Bar of Georgia, with enhanced recognition for those who complete additional years of service;
3. Inclusion in an annual special section of the *Georgia Bar Journal* devoted to mentoring success stories and publicizing mentors who mentor lawyers not in the same firm or who lead out-of-firm mentoring groups;
4. Inclusion in a special feature on the State Bar's website to list all those who are appointed by the Georgia Supreme Court to serve as mentors;
5. Special recognition of mentor success stories, testimonials, etc. in the Young Lawyers Division publications.

G. Liability of Mentors and Insurance

1. All mentors are expected to certify that they have and will maintain professional liability insurance with minimum limits of \$250,000.00/\$500,000.00, or its equivalent.
2. All beginning lawyers and mentors will be required to sign a disclaimer which deals with areas that give rise to some potential liability. The form previously used in the Pilot Project is attached here as Appendix B entitled “Transition Into Law Practice Program Continuing Legal Education Agreement Between Mentors and Beginning Lawyers.”
3. The State Bar of Georgia will purchase insurance coverage with respect to the Program itself.

III. BEGINNING LAWYERS

A. Coverage

The Program is intended to assist beginning lawyers who are newly admitted to the State Bar of Georgia. For purposes of the Program, the term "beginning lawyer" means a person who is recently admitted to the State Bar of Georgia and who is engaged for the first time in the practice of law in this state.

Lawyers who enter the practice of law as federal, state, local, or other governmental employees may satisfy the requirements of the Program by participating for twelve months in an approved new lawyer mentoring program specially designed for the government office or agency under policies and procedures established by the Standards of the Profession Committee and the Commission on Continuing Lawyer Competency.

The following lawyers are not covered by the mandatory program:

1. Lawyers admitted to practice in this state who have principal practices in another state;
2. Lawyers who have been admitted to the practice of law in another United States jurisdiction outside of Georgia for two or more years prior to admission to practice in this state; and
3. Lawyers serving as judicial law clerks. These lawyers will not be subject to the mandatory program during the period of the judicial clerkship but will be covered once the clerkship ends for the first year thereafter that they engage in the practice of law in this state.

B. Anticipated Number of Beginning Lawyers

Based on historical averages of bar admissions and attendance at Bridge-the-Gap, the Program must be set up to accommodate about 1,200 beginning lawyers each year. Of these, roughly 150 to 200 will enter practice on their own and not in association with a lawyer who has at least five years of experience. Because these latter beginning lawyers generally will not have a natural mentor at hand, matching these new lawyers with qualified outside mentors is likely to be the greatest continuing challenge faced by the Program.

IV. CLE COMPONENT:
ENHANCED BRIDGE-THE-GAP PROGRAM
FUNDAMENTALS OF LAW PRACTICE PROGRAM

A. Curriculum Design, Content and Format

The Transition Into Practice Program will inaugurate two new CLE programs for beginning lawyers that will replace the existing Bridge-the-Gap program. These new programs are the Enhanced Bridge-the-Gap Program and the Fundamentals of Law Practice Program. Both programs are two-day programs that cover the same topics. The programs differ only in the format and setting. Enhanced Bridge-the-Gap will be delivered in large group sessions. Fundamentals of Law Practice will be delivered in small group sessions. ICLE will administer and conduct both programs.

Both of the new CLE programs are designed to build upon and expand on the current Bridge-the-Gap curriculum by incorporating and specifically addressing the work of lawyers in counseling clients, interacting with others on behalf of clients and negotiating for clients. In shorthand, these three core roles of a lawyer will be addressed under the headings of Working With Your Client, Acting for Your Client, and Negotiating for Your Client.

Whether the beginning lawyer attends the Enhanced Bridge-the-Gap Program or the Fundamentals of Law Practice Program, he or she will receive an introduction to these three topics in addition to practical guidance in specific practice areas as well as other general information. Both programs are intended to support the mentoring experience by laying a groundwork to assist beginning lawyers in discussing with experienced lawyers basic precepts and ethical and professional norms.

The difference between the two programs comes mainly in the format and setting in which the instruction will be offered. A draft of the Agenda and Schedule for each program is attached as Appendix C.

1. Enhanced Bridge-the-Gap

Like the current Bridge-the-Gap program, the new program will be offered in large group sessions of approximately 500 to 600 new lawyers. The current program will be extended from one day to two consecutive days in length to incorporate the new topics of Working With Your Client, Acting For Your Client, and Negotiating For Your Client. For these sessions of 100 minutes each, the attendees will be divided into three groups of approximately 160-200 each. The speakers will present these topics in a way to inform and facilitate further discussion between the beginning lawyer and his or her own mentor back in the law practice setting or mentoring group.

Most beginning lawyers will attend the two-day Enhanced Bridge-the-Gap Program. The costs of this program will be met through the payment of the same CLE fees currently charged for the existing six-hour Bridge-the-Gap program and the second six-hour CLE elective program required of all new attorneys.

The new Enhanced Bridge-the-Gap Program will be offered live twice a year and on video replay. The initial year's presentations will be held in February 2006 and September 2006.

2. Fundamentals of Law Practice

The second CLE program is being designated as Fundamentals of Law Practice to distinguish it from the Enhanced Bridge-the-Gap. This will also be a two-day program and will cover the same topics as the Enhanced Bridge-the-Gap program. The session on the topics of Working With Your Client, Acting For Your Client, and Negotiating For Your Client will be lengthened to two hours each, however. More importantly, attendance at the Fundamentals of Law Practice programs will be limited to 100 beginning lawyers, and it will utilize multiple small breakout sessions. Discussion leaders who are all experienced lawyers will meet with the beginning lawyers in small groups of 12 to 15 to discuss the topics and other practice tips and to answer questions. The format is intended to foster close interaction between the beginning lawyers and experienced lawyers.

While any beginning lawyer may attend the Fundamentals of Law Practice Program, first priority will be given to beginning lawyers who are not practicing with a firm that has a lawyer of five years or more of experience. In these small group settings, the Fundamentals of Law Practice Program will attempt to offer beginning lawyers, who do not practice in association with an experienced lawyer, an opportunity to talk one-on-one and learn from the experienced lawyers who will serve as the instructors.

All beginning lawyers will be required to attend one or the other of these programs during the first twelve months after admission to the State Bar, or as soon thereafter as feasible. Beginning lawyers who do not practice in association with a lawyer of at least five years experience may attend either the Enhanced Bridge-the-Gap or Fundamentals of Law

Practice Program, but these beginning lawyers will be given first priority in attending the Fundamentals of Law Practice Program with its small group settings.

The Fundamentals of Law Practice Program will be offered live in sessions of two consecutive days twice a year beginning first in December 2005 and then in June-July 2006. The December program will be held in Atlanta, and the summer program will be held at Mercer Law School in Macon.

Feedback from the Pilot Project underscored the importance of conducting these programs at appropriate times: neither too soon before the beginning lawyers had had any experience in practice, nor so late that professional guidance and advice that can be imparted in the program have, owing to the passage of time, become less useful. The dates chosen for the program are also, of course, largely influenced by the timing of the Georgia Bar Examination and the release of results. The dates of December and June-July for the Fundamentals of Practice Program and February and September for the Enhanced Bridge-the-Gap Program were selected with these factors in mind.

B. Recruitment of Instructors

Delivering high-quality CLE instruction for four live programs will require a dedicated group of experienced lawyers. It is estimated that a corps of instructors numbering twenty (20) to twenty-five (25) will be needed since, because of the variations in scheduling, the same instructors may not be available for each session. Nevertheless, it is desirable to have a corps of experienced instructors who will gain knowledge about how best to provide the instruction.

The natural pool from which to recruit instructors will be the lawyers who currently teach in Bridge-the-Gap Program, members of the Standards of the Profession Committee, and the lawyers who volunteered to act as instructors in the Pilot Project. As is the policy of ICLE generally, instructors will not be paid, although from time to time modest honorariums might be paid to law school faculty to take on extra work of preparing new teaching materials and resource materials to be furnished to the mentors.

C. Preparation of Teaching Materials for the CLE Programs and Resource Materials for Mentors

Drawing on the work done on the earlier Pilot Project, the Program Director, assisted by the Curriculum Committee of the Standards Committee, will be responsible for preparing teaching materials for the two new CLE programs and resource materials for the mentors. Attached as Appendix D is a syllabus identifying the core concepts to be covered in these programs and offering illustrative questions that can be used by the mentors to extend these discussions later within the firm or other practice setting after the general introduction of these key concepts during the CLE programs.

**V. MENTORING COMPONENT:
PLAN OF MENTORING ACTIVITIES AND EXPERIENCES;
MINIMUM REQUIREMENTS; PLEDGE;
CERTIFICATE OF SATISFACTORY COMPLETION**

A. Model Plan as Guide

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 (Appendix E) has been prepared. 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. The Model Plan is just that – a model that can serve as a template for the mentor and beginning lawyer to use. 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.

B. Preparation and Submission of a Customized Mentoring Plan; Minimum Requirements

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. Although great flexibility in designing each particular plan is warranted, the plan should foster discussion and implementation of professional skills and

values. Mere supervision of a new lawyer's substantive work for clients, without more, is not sufficient. At a minimum then, the Mentoring Plan must include the following key elements:

1. Regular contact and meetings between the mentor and beginning lawyer.
2. Continuing discussions between the mentor and beginning lawyer on at least the following topics:
 - (a) Ethics and professionalism.
 - (b) Relationships with clients, other lawyers (both in and outside the firm), the judiciary and the public, including unrepresented parties.
 - (c) Professional work habits, organizational skills and practice management.
 - (d) Economics of practicing law in the relevant practice setting.
 - (e) Responsibility and opportunities for pro bono work, bar activities, and community service.
3. Introduction to the local legal community.
4. Specific planning for professional development and continuing legal education in and outside the firm.
5. Periodic evaluation of the mentor-beginning lawyer relationship.

C. Advocacy Experiences

Although the Advocacy Experiences listed in Section E of the Model Plan are deemed to be useful for all beginning lawyers, they are mandatory only for 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 case². Such lawyers must observe the following:

- (1) An actual or simulated deposition of a witness or adverse party in a civil action;
- (2) An actual or simulated jury trial in a civil or criminal case in either a state or federal court;
- (3) An actual or simulated nonjury trial or evidentiary hearing in a state or federal court;
- (4) An actual or webcast of an appellate argument in the Supreme Court of Georgia, the Court of Appeals of Georgia, a United States Circuit Court of Appeals, or the Supreme Court of the United States; and
- (5) An actual or simulated mediation.

The Advocacy Experiences requirement cannot be satisfied merely by observing the advocacy events described above. It is an essential part of the requirement that the litigation events observed are considered in context and then critically evaluated with the

² Rule 8-104(D) of the Rules and Regulations for the Organization and Government of the State Bar of Georgia.

aid of an experienced lawyer who is familiar with such proceedings.

D. Pledge of Commitment

To signify their mutual commitment to carry out the agreed upon Mentoring Plan in a meaningful manner, the mentor and beginning lawyer will be asked to sign a pledge in the form attached at the end of the Model Plan in Appendix E. A pledge seems an appropriately serious signification of the acceptance of a relationship of trust and professional guidance being assumed by the parties.

E. Certificate of Satisfactory Completion

At the end of twelve months of mentoring, the beginning lawyer and his or her mentor or the head of his or her mentoring group must sign a certificate evidencing that the beginning lawyer has satisfactorily completed the Transition Into Law Practice Program by attending the required CLE programs and substantially completing the Mentoring Plan agreed to by the mentor and beginning lawyer at the outset of the mentorship. The certificate of satisfactory completion must be sent to the Program Director.

VI. PENALTIES FOR FAILURE TO COMPLETE THE PROGRAM

The procedure for penalizing the failure to complete the Program will be the same as used currently for failure to complete mandatory CLE; i.e, through the procedures already in place with the Commission on Continuing Lawyer Competency. The penalty for failure to complete the CLE component of the Program (Enhanced Bridge-the-Gap or Fundamentals of Law Practice) will be to make up the missed session or sessions at the next available session. The penalty for failure to complete the Mentoring Plan agreed upon by the mentor or mentor team and beginning lawyer will be to complete a Rehabilitation Plan approved by the Program Director and the Commission 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.

VII. INTRODUCTION OF THE PROGRAM TO NEWLY ADMITTED LAWYERS AND TO THE BAR

A. Introduction of Program to Newly Admitted Lawyers

The first class of beginning lawyers who will be required to participate in the mandatory Program will be those new lawyers who take and pass the summer 2005 Georgia Bar Examination.

1. Law Schools in Georgia

In the fall of 2004, when the class of 2005 is starting the third year of law school, presentations will be made at the five law schools in Georgia to the third-year classes to explain the purpose, goals, and requirements of the Program. The assistance of the law school deans, their administrative staffs, and the student leaders at each school will be enlisted to help unveil the Program at each school. In the early years of the Program, the presence and participation of the dean, judges, bar leaders as well as representatives of the Standards Committee can add to the significance of the event and underscore the importance of the Program in the eyes of the law school, the Judiciary and the Bar.

2. Out-of-State Law Schools

Letters with relevant explanatory materials will be mailed to the deans' offices in law schools in the United States whose graduates take the Georgia Bar Examination.

3. Registrants for Georgia Bar Examination

When a student registers to take the Georgia Bar Examination, a letter about the program with explanatory materials will be sent to the student. Most importantly, when an applicant is sent the Bar Examination passage letter from the Office of Bar Admissions, the applicant will also receive a letter (ideally from the State Bar President) welcoming him or her to the profession and outlining the structure and goals for the Mandatory Transition into Law Practice Program.

B. Introduction to Employers

Once approved by the Board of Governors and the Supreme Court, letters describing the Program's refinements will be sent in conjunction with other mailings to all active members of the State Bar and complete information about the Program will be added to the State Bar's website. Presentations about the program should be made at local bar associations and information disseminated at ICLE programs.

An article about the Program should be published prominently in the *Georgia Bar Journal*. Special outreach efforts should be directed toward law firm or employer recruiting coordinators, associate training coordinators, or hiring partners with the assistance of the law school legal career services directors.

VIII. ADMINISTRATION, BUDGET AND FUNDING

A. Oversight of Program

The Program will be implemented under the auspices of the Commission on Continuing Lawyer Competency ("the Commission") pursuant to its "general supervisory authority to administer [the minimum requirements for continuing legal education] rules." Rule 8-103 (B) of the Rules and Regulations for the Organization and Government of the State Bar of Georgia. An Amendment to the Rules of the Commission to effectuate the Program will be submitted to the Supreme Court for its approval.

B. Administrative Structure

1. Changes to the Commission

- (a) The Program will be administered through the offices of the Chief Justice's Commission on Professionalism ("CJCP"), based on the CJCP's experience with the administration of the Pilot Project for the Transition Into Law Practice Program, as well as the CJCP's decade of experience in developing and presenting programs for law students and members of the Bar on issues of ethics and professionalism.
- (b) The membership of the Commission will be increased to include as voting members the following stakeholders in the Program, together with the current membership of the Commission:
 - (i) Representative of Executive Committee of the Bar, designated by the Executive Committee;

- (ii) Chair of the ICLE Board;
- (iii) Representative of the Chief Justices's Commission on Professionalism designated by the CJCP;
- (iv) President of Young Lawyers Division or his or her designee;
- (v) Chair of the Standards of the Profession Committee.

2. Responsibility and Role of the Standards Committee

The Standards of the Profession Committee will become a standing committee of the Commission with the following responsibilities:

- (a) To devise and recommend policy to the full Commission as to the operation of the program, to include:
 - Staffing
 - Procedures
 - Qualifications of mentors
 - Recruitment of mentors
 - Assignment of mentors and beginning lawyers
 - Turnover and migration of mentors and beginning lawyers
 - CLE credit for mentors
 - Liability insurance for the Program
 - Determination of equivalencies for professional liability insurance for public sector mentors
 - Penalties for noncompliance
- (b) To serve as a Mentor Advisory Board to receive questions and concerns of mentors and advise them of "best practices" in the particular circumstances;

- (c) To serve as a corps of faculty to teach in the CLE courses of the Program;
- (d) To oversee and support Mentoring Groups in assigned geographic areas of the state;
- (e) To assist in introducing the Program to law students and to law firms and other employers of beginning lawyers.

The Standards of the Profession Committee of the Commission will likely meet more often than the twice-yearly meetings of the full Commission. Under delegated authority from the Commission, the Standards Committee will make decisions regarding policies for the Program. The Standards Committee will serve as the body with which the Program Director would consult on issues with which he or she needs assistance. Appeals from the decisions of the Standards Committee will be made to the full Commission. Decisions regarding finances for the Program will come to the full Commission, with recommendations from the Standards Committee and the Finance Committee of the Commission. These proposals are consistent with the current Commission rules and regulations. According to Regulation (1) of Rule 8-103 (B):

The Commission is the final authority on all matters entrusted to it under these rules. Therefore, any decision made by a committee of the Commission pursuant to a delegation of authority may be appealed to the full Commission. A decision made by the staff of the Commission pursuant to a delegation of authority may also be reviewed by the full Commission, but should first be appealed to the committee of the Commission having jurisdiction on the subject involved.

All appeals shall be in writing. The Commission has the discretion to, but is not obligated to, grant a hearing in connection with any appeal.

3. Staffing of the Program

The Program's administration staff should be composed of the Program Director and one Administrative Assistant. The Program's administration staff will be housed in the offices of the CJCP at the Bar Center and supervised by the Executive Director of the CJCP. The Program Director will make reports, both oral and written, to the Standards Committee and, through the Executive Director of the CJCP, to the full Commission at its meetings.

Program Director

Qualifications:

- Member in good standing of the State Bar of Georgia for at least five, and preferably ten, years with a reputation for professionalism among the members of the Bar
- Extensive knowledge of the practice of law, the structure of the State Bar of Georgia, the Georgia Rules of Professional Conduct, and the work of the Chief Justice's Commission on Professionalism
- Advanced organizational and strong oral and written communication skills
- Experience as a mentor (preferred)
- Mediation training (preferred)

Responsibilities:

- Implementing recruitment plan for mentors
- Coordinating Mentor Orientation Programs with ICLE
- Coordinating with the Office of Bar Admissions and the State Bar Membership Department communications and correspondence with lawyers newly admitted to the State Bar of Georgia
- Working with the Standards of the Profession Committee to design introductory materials for beginning lawyers and resource material for mentors
- Reviewing in-firm mentors and out-of-firm mentors proposed by beginning lawyers
- Recruiting and assigning mentors or group mentor teams to beginning lawyers not in law firms
- Providing written confirmation of all mentor assignments
- Monitoring all mentor assignments
- Resolving turnover and migration issues for mentorships
- Serving as a resource for mentors on “best practices” for mentoring, including providing useful articles and other materials
- Sending written reminders to mentors and beginning lawyers of Program requirements
- Overseeing the completion of the Mentoring Plans of mentors and beginning lawyers
- Making reports to the Standards Committee of the Commission and to the full Commission when requested
- Speaking at law schools, CLE and local bar association events about the Program

4. Division of Responsibilities among the Commission, State Bar of Georgia, CJCP, and ICLE

The Commission	Policy decisions regarding the Program
CJCP	Administration of the mentoring component and general administration of the Program
ICLE	Delivery of CLE programming: Mentor Orientations Enhanced Bridge-the-Gap Fundamentals of Law Practice
Curriculum Subcommittee of Standards Committee, CJCP, ICLE	Design of CLE programming and Mentor Orientations
State Bar of Georgia	Funding and accounting

The staffs of each of these organizations will report to their current boards for personnel and work standards issues. They will report to the Commission's Standards Committee on issues relating to the Program.

5. Determination of Annual Start-Up Dates for the Program

The inaugural year of the Program will commence on January 1, 2006, for new lawyers who pass the Georgia Bar Examination administered in July 2005 and

are admitted to practice. Assignments of mentors and beginning lawyers will be made prior to the end of 2005, and the first live Fundamentals of Practice Program will be held in December 2005. The duration of the Program will be the calendar year; i.e, January 1 through December 31. For beginning lawyers who pass the Georgia Bar Examination administered in February 2006 and are admitted to practice, the Program will commence on July 1, 2006, for a twelve month period ending June 30, 2007.

6. Evaluation of Program Pursuant to Sunset Provision

Pursuant to the State Bar's policy, all new programs are subject to a Sunset Provision under which the program is allowed to operate for three years and then must be evaluated for effectiveness in the third year. If the evaluation shows that the program is effective, it will be allowed to continue.

This Program will run for four full cycles of mentorships:

January 1, 2006 to December 31, 2006;

July 1, 2006 to June 30, 2007;

January 1, 2007 to December 31, 2007;

July 1, 2007 to June 30, 2008.

In January 2008, the Standards Committee will begin an evaluation of the Program's effectiveness. The evaluation will be presented to the Executive Committee of the State Bar and the Board of Governors in June 2008. The Standards Committee of the Commission will work with the Executive Committee of the State Bar in designing the evaluation form to be sent to each mentor and each beginning lawyer who has participated in the Program. Evaluations will be

gathered from participants in the Program to allow the Executive Committee and the Board of Governors to make an informed decision about the value of the Program and whether it should be continued.

7. Budget and Funding

The Program will be funded by the State Bar of Georgia. As the Estimated Budgets attached as Appendix F show, the expenses of the Program, when fully implemented, will be approximately \$282,000 per year, exclusive of insurance coverage for the Program. At the current State Bar membership of 30,000, the annual cost of the Program would be approximately \$10 per member. The Board of Governors will decide how to fund this Program.

IX. CONCLUSION

The Standards Committee recognizes that this Implementation Plan is ambitious and multi-faceted. The recommendations on which the Plan is based seek to improve the transition into practice for all beginning lawyers entering practice and, at the same time, to distinguish between lawyers beginning practice in association with experienced lawyers and those beginning practice on their own or in firms where no lawyer has had five years of practice experience. The Committee's recommendations seek to take advantage of existing training and mentoring likely to occur for new lawyers in established practice settings, while seeking to extend and solidify the quality of that mentoring. At the same time, the recommendations concentrate the Bar's efforts and resources on those beginning lawyers who start their careers outside a practice setting that offers mentors and supervisors in house.

Respectfully submitted this ____ day of _____,

John T. Marshall, Chair

C. Ronald Ellington, Reporter

Standards of the Profession Committee State Bar of Georgia

John T. Marshall, Chair
William G. Scrantom Jr., Vice Chair
Lawrence F. Jones, Executive Director,
Institute of Continuing Legal Education

C. Ronald Ellington, Reporter
Hulett H. Askew, Director of Bar Admissions
Sarah E. Lockwood, Executive Director,
Chief Justice's Commission on
Professionalism

Committee Members

³The Honorable Ross J. Adams, Marietta
Hulett H. Askew, Atlanta
James A. Bishop Jr., Brunswick
Timothy J. Buckley III, Atlanta
Marcus B. Calhoun Jr., Columbus
Benjamin F. Easterlin IV, Atlanta
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Executive Committee Liaison

George R. Reinhardt Jr., Tifton

Advisors

Cliff Brashier, Executive Director, State Bar of
Georgia, Atlanta

³ The Committee acknowledges with gratitude the contributions of the late Honorable Ross J. Adams as liaison from the Young Lawyers Division of the State Bar.

APPENDIX A

TIMETABLE

**TIMETABLE
for
TRANSITION INTO LAW PRACTICE PROGRAM**

January 7, 2004	Presentation of concept to Supreme Court of Georgia
January - June 2004	Development of Implementation Plan
August - September 2004	Presentation of Implementation Plan to Board of Governors and Supreme Court
September 2004 - July 2005	Preparations for Program, including educating law schools, bar, judiciary, and employers about the Program; introducing Program to 3 rd Year law students; hiring staff, recruiting mentors, designing curriculum for Enhanced Bridge-the-Gap and Fundamentals of Law practice Programs; designing Mentor Orientation; , developing policies and procedures
Fall 2004	Information on Program sent to 3 rd Year students at law schools in Georgia and to deans of out-of-state law schools whose students typically take the Georgia Bar Examination
Fall 2004 - Winter 2005	Information on Program sent and presentations made to: Local/circuit and voluntary bar associations in Georgia; Federal district court judges and state and superior court judges in Georgia; Managing partners of law firms in Georgia
January - June 2005	Hiring process for Program Director and Administrative Assistant
January - October 2005	Recruitment of Mentors for First Class of Mentors and Beginning Lawyers
February 2005	Georgia Bar Examination administered
Spring 2005	Presentation at each law school in Georgia introducing Program to 3 rd Year students
May 2005	Results of February 2005 Bar Examination released
Summer 2005	Training of Program Director and Administrative Assistant
July 2005	Georgia Bar Examination administered, from which First Class of Beginning Lawyers in Program comes Traditional Bridge-the-Gap CLE Program offered as Video Replay for newly admitted lawyers admitted prior to July 1, 2005
September 2005	Traditional Bridge-the-Gap CLE Program offered live for newly admitted lawyers admitted prior to July 1, 2005
October 2005	Results of July 2005 Bar Examination released

November 2005	Assignments of First Class of Mentors and Beginning Lawyers (Jan. 1 - Dec. 31, 2006, from July 2005 exam) Mentor Orientation for First Class of Mentors
December 2005	First Fundamentals of Law Practice CLE Program offered live in Atlanta
January - October 2006	Recruitment of Mentors
January - December 2006	First Class of Mentors and Beginning Lawyers (from July 2005 exam) proceed through Program
February 2006	First Enhanced Bridge-the-Gap CLE Program offered live in Atlanta Georgia Bar Examination administered
Spring 2006	Presentation at each law school in Georgia introducing Program to 3 rd Year Students
May 2006	Results of February 2006 Bar Exam released
May or June 2006	Mentor Orientation
June 2006	Assignments of Second Class of Mentors and Beginning Lawyers (July 1, 2006 - June 30, 2007, from February 2006 exam)
June or July 2006	Fundamentals of Law Practice CLE Program offered live at Mercer Law School in Macon
July 2006	Georgia Bar Examination administered
July 2006 - June 2007	Second Class of Mentors and Beginning Lawyers (from February 2006 exam) proceed through Program
September 2006	Enhanced Bridge-the-Gap CLE Program offered live in Atlanta
October 2006	Results of July 2006 Bar Exam released
November 2006	Assignments of Third Class of Mentors and Beginning Lawyers (Jan. 1 - Dec. 31, 2007, from July 2006 exam) Mentor Orientation
December 2006	Fundamentals of Law Practice CLE Program offered live in Atlanta
January - October 2007	Recruitment of Mentors
January - December 2007	Third Class of Mentors and Beginning Lawyers (from July 2006 exam) proceed through program
February 2007	Enhanced Bridge-the-Gap CLE Program offered live in Atlanta Georgia Bar Examination administered

Spring 2007	Presentation at each law school in Georgia introducing Program to 3 rd Year students
May 2007	Results of February 2007 Bar Examination released
May or June 2007	Mentor Orientation
June 2007	Assignments of Fourth Class of Mentors and Beginning Lawyers (July 1, 2007 - June 30, 2008, from February 2007 exam)
June or July 2007	Fundamentals of Law Practice CLE Program offered live at Mercer Law School in Macon
July 2007	Georgia Bar Examination administered
July 2007 - June 2008	Fourth Class of Mentors and Beginning Lawyers (from February 2007 exam) proceed through Program
September 2007	Enhanced Bridge-the-Gap CLE Program offered live in Atlanta
October 2007	Results of July 2007 Bar Examination released
November 2007	Assignments of Fifth Class of Mentors and Beginning Lawyers (Jan. 1 - Dec. 31, 2008, from July 2007 exam)
	Mentor Orientation
December 2007	Fundamentals of Law Practice CLE Program offered live in Atlanta
January - October 2008	Recruitment of Mentors
January - December 2008	Fifth Class of Mentors and Beginning Lawyers (from July 2007 exam) proceed through Program
February 2008	Enhanced Bridge-the-Gap CLE Program offered live in Atlanta
	Georgia Bar Examination administered
January - June 2008	Evaluation of Years 1 (2006) and 2 (2007) of Program
May 2008	Results of February 2008 Bar Examination released
June 2008	Report of Evaluation of Years 1 (2006) and 2 (2007) to Board of Governors and Supreme Court of Georgia
	If Program is retained:
June 2008	Assignments of Sixth Class of Mentors and Beginning Lawyers (July 1, 2008 - June 30, 2009, from February 2008 exam)
	Mentor Orientation
June or July 2008	Fundamentals of Law Practice CLE Program offered live at Mercer Law School in Macon

July 2008	Georgia Bar Examination administered (whether or not Program is retained)
July 2008 - June 2009	Sixth Class of Mentors and Beginning Lawyers (from February 2008 exam) proceed through Program
September 2008	Enhanced Bridge-the-Gap CLE Program offered live in Atlanta
October 2008	Results of July 2008 Bar Examination released
November 2008	Assignments of Seventh Class of Mentors and Beginning Lawyers (Jan. 1 - Dec. 31, 2008, from July 2008 exam)
	Mentor Orientation
December 2008	Fundamentals of Law Practice CLE Program offered live in Atlanta
January - December 2009	Seventh Class of Mentors and Beginning Lawyers (from July 2008 exam) proceed through Program
January - October 2009	Recruitment of Mentors
February 2009	Enhanced Bridge-the-Gap CLE Program offered live in Atlanta
	Georgia Bar Examination administered
Spring 2009	Presentation at each law school in Georgia introducing Program to 3 rd Year students
May 2009	Results of February Georgia Bar Examination released
June 2009	Assignments of Eighth Class of Mentors and Beginning Lawyers (July 1, 2009 - June 30, 2010, from February 2009 exam)

APPENDIX B

TRANSITION INTO LAW PRACTICE PROGRAM CONTINUING LEGAL EDUCATION AGREEMENT

**TRANSITION INTO LAW PRACTICE PROGRAM
CONTINUING LEGAL EDUCATION AGREEMENT
BETWEEN MENTORS AND BEGINNING LAWYERS**

The State Bar of Georgia, based upon a recommendation of the Committee on the Standards of the Profession, has adopted a continuing legal education Transition Into Law Practice Program ("Program") for lawyers who recently have been granted a license to practice law in the State of Georgia. This Program combines a Mentoring component with a Curriculum component for the first year after admission to the Bar. The relationship between Mentor and Beginning Lawyer shall be governed by the following terms and conditions:

1. The undersigned have signed this Transition Into Law Practice Program Continuing Legal Education Agreement as Mentor and as Beginning Lawyer, respectively, in the spaces provided under the terms and conditions hereinafter contained.

2. The Mentor and the Beginning Lawyer understand that any information and/or advice received by the Beginning Lawyer from the Mentor or other communication between them in the course of participation in the Program is to guide the Beginning Lawyer in his or her law practice as an educational resource and to provide opportunities for the discussion of general issues confronted by the Beginning Lawyer in the practice of law. The Mentor will be acting in a good faith effort to guide the Beginning Lawyer; however, the Beginning Lawyer understands and agrees that the Beginning Lawyer can in no way rely upon the advice and/or statements of the Mentor or any others in any Mentoring Group for legal advice and that the Mentor is not rendering legal or professional advice to the Beginning Lawyer or any of the Beginning Lawyer's clients, through the Beginning Lawyer. The Beginning Lawyer agrees not to ask the Mentor for case specific advice, not to give to the Mentor actual names of clients, and agrees to deal with any problems the Beginning Lawyer has in only a general manner. The Beginning Lawyer understands that neither the State Bar of Georgia nor the Mentor warrants or represents that any information or advice that may be imparted to the Beginning Lawyer is to be acted on or relied upon by the Beginning Lawyer in handling a specific matter for a client. The sole purpose of the advice and information furnished during the mentorship is to continue the legal education of the Beginning Lawyer during his or her first year of practice by assisting the Beginning Lawyer in acquiring practical skills and in deepening his or her understanding of ethical and professional values expected of lawyers in practice.

3. The Beginning Lawyer expressly agrees not to and disclaims any right to rely upon the continuing legal education provided by the Mentor or the State Bar of Georgia with respect to any acts or omissions to act, or any other behavior, in which the Beginning Lawyer might engage, whether such future acts, omissions or other behavior is known or unknown to the Beginning Lawyer as of the date this Agreement is executed.

4. It is an express goal of all parties to this Agreement that clients of the Beginning Lawyer shall not be placed in a position where they might rely upon any communication between the Mentor and the Beginning Lawyer which is part of the Program. The Beginning Lawyer agrees that he will take no action to cause his clients or other third parties to rely upon any communication between the Mentor and the Beginning Lawyer. The Beginning Lawyer understands that, although the Mentor is engaged in the practice of law, the Mentor is not rendering legal or professional advice to the Beginning Lawyer or to any of Beginning Lawyer's clients through the Beginning Lawyer.

5. **THE BEGINNING LAWYER ACKNOWLEDGES THAT THE INFORMATION THE BEGINNING LAWYER RECEIVES IN THE COURSE OF THE MENTORSHIP WILL NOT BE RELIED UPON BY THE BEGINNING LAWYER AS A SUBSTITUTE FOR THE BEGINNING LAWYERS OWN JUDGMENT OR LEGAL OPINIONS, AND THE BEGINNING LAWYER UNDERSTANDS THAT THE OPINIONS OR STATEMENTS OF THE MENTOR ARE NOT A SUBSTITUTE FOR THE BEGINNING LAWYER'S OWN OPINION OR INDEPENDENT RESEARCH.**

6. The Beginning Lawyer shall not reveal to the Mentor any confidential communications between the Beginning Lawyer and the Beginning Lawyer's clients.

7. This Agreement shall be governed by and construed in accordance with the law of the State of Georgia.

8. The Mentor and the Beginning Lawyer agree that no client of the Beginning Lawyer's nor any other third person, firm or corporation shall be a beneficiary of this Agreement and that this Agreement shall not confer any rights upon any person, firm or corporation other than the rights of the parties hereto as herein above specified.

9. This Agreement and the representations and promises herein constitute the full and complete agreement between the Mentor and the Beginning Lawyer and shall not be altered or amended except by an agreement in writing duly executed by both the Mentor and the Beginning Lawyer. The Mentor and the Beginning Lawyer each warrant that such party has read, understands and accepts the provisions hereof.

Date: _____

Beginning Lawyer: _____

Date: _____

Mentor: _____

APPENDIX C

**PROGRAM AGENDAS
FOR
ENHANCED BRIDGE THE GAP
AND
FUNDAMENTALS OF LAW PRACTICE**

**PROGRAM AGENDA FOR
ENHANCED BRIDGE THE GAP PROGRAM**

DAY ONE

- 8:15 **REGISTRATION**
- 8:50 **WELCOME**
- 9:00 **INTRODUCTION TO THE TRANSITION INTO PRACTICE PROGRAM**
- 9:30 **DISCIPLINARY ACTIONS – HOW TO AVOID THEM**
General Counsel's Office
- 10:00 **LAWYER ASSISTANCE PROGRAM**
- 10:15 **BREAK**
- 10:30 **ORGANIZING YOUR TIME**
Natalie Thornwell
- 11:00 **MALPRACTICE PREVENTION AND PURCHASING MALPRACTICE INSURANCE**
Randy Evans
- 11:45 **LUNCHEON SPEAKER ON “LAW AS A CALLING”**
- 12:45 **PRACTICE POINTERS BREAKOUT SESSION ONE (CHOOSE ONE)**
A. Criminal Defense
B. Wills and Estates
C. Corporate Practice
- 2:25 **BREAK**
- 2:40 **PRACTICE POINTERS BREAKOUT SESSION TWO (CHOOSE ONE)**
A. Civil Litigation
B. Real Estate
C. Bankruptcy
- 4:10 **PRACTICE POINTERS BREAKOUT SESSION THREE (CHOOSE ONE)**
A. Family Law
B. Workers' Compensation
C. Large Firm Culture
- 5:30 **RECESS**

ENHANCED BRIDGE THE GAP

DAY TWO

The attendees will be divided into three groups, and each group will attend each session:

- A. Working with your Client**
- B. Acting for your Client**
- C. Negotiating for your Client**

9:00 FIRST SESSION

10:40 BREAK

10:55 SECOND SESSION

12:35 LUNCHEON SPEAKER (?)

1:35 THIRD SESSION

3:15 ADJOURN

**PROGRAM AGENDA
FOR
FUNDAMENTALS OF LAW PRACTICE PROGRAM**

DAY ONE

- 8:15 **REGISTRATION**
- 8:50 **WELCOME**
- 9:00 **INTRODUCTION TO THE TRANSITION INTO PRACTICE PROGRAM**
- 9:30 **DISCIPLINARY ACTIONS – HOW TO AVOID THEM**
General Counsel's Office
- 10:00 **LAWYER ASSISTANCE PROGRAM**
- 10:15 **BREAK**
- 10:30 **ORGANIZING YOUR TIME**
Natalie Thornwell
- 11:00 **MALPRACTICE PREVENTION AND PURCHASING MALPRACTICE INSURANCE**
Randy Evans
- 11:45 **LUNCHEON SPEAKER ON “LAW AS A CALLING”**
- ROTATING PRACTICE POINTERS BREAKOUT SESSIONS ON THE FOLLOWING TOPICS:**
- A. Civil Litigation**
 - B. Criminal Defense**
 - C. Real Estate**
 - D. Family Law**
 - E. Representing Small Businesses**
 - F. Wills and Estates**
- 12:45 **BREAKOUT SESSION ONE**
Topics A, B, C, & D
- 2:15 **BREAK**
- 2:30 **BREAKOUT SESSION TWO**
Topics A, B, E & F
- 4:00 **BREAKOUT SESSION THREE**
Topics C, D, E, & F
- 5:30 **RECESS**

FUNDAMENTALS OF LAW PRACTICE

DAY TWO

The attendees will be divided into four or five groups, and each group will attend each session:

- A. Working with your Client
- B. Acting for your Client
- C. Negotiating for your Client

9:00 **FIRST SESSION**

11:00 **BREAK**

11:15 **SECOND SESSION**

12:15 **LUNCHEON**

1:15 **SECOND SESSIONS (CONTINUED)**

2:15 **BREAK**

2:30 **THIRD SESSION**

4:30 **ADJOURN**

APPENDIX D

SYLLABUS FOR PROGRAMS AND TOPICAL QUESTIONS FOR USE BY MENTORS

- 1. WORKING WITH YOUR CLIENT**
- 2. ACTING FOR YOUR CLIENT**
- 3. NEGOTIATING FOR YOUR CLIENT**

Appendix D

I. Working With Your Client

Working and Communicating with Clients: The Lawyer as Counselor

A. Basic Concepts

1. Understanding the client's problem and most important objectives (learning to listen and hear).
2. Identifying and evaluating potential solutions (gathering facts and investigating) (evaluating alternatives in light of positive and negative consequences)
3. Making the decision or aiding the client to make the decision (sophisticated client or neophyte client)
4. Communicating (continuously) with client

B. Topical Questions:¹

1. What decisions may or should a lawyer make for the client without consultation or permission? (sophisticated, established client versus "Babe in the Woods")
2. When should a lawyer offer the client his or her own advice with respect to non-legal aspects of a matter?
3. Who is the client in the case of a corporation? estate? governmental entity? insured-insurer?
4. When does the attorney-client relationship begin?
5. How (politely) does a lawyer test her client's story?
6. How do you check for conflicts initially and during the course of the representation?
7. How do you avoid over-promising in order to get engagement letter signed or over-warning about downsides of the matter?
8. How do you decide whether to accept the representation?
9. How do you and when do you decline a representation?
10. How do you set and collect fees?

¹The list of Topical Questions is illustrative only. The Mentor should bring his or her own experience to bear in discussing such issues.

11. How do you handle/resolve disputes and disagreement with your client over tactics? decision to settle? fee?
12. What do you do when you and client receive a Section 9-15-14 motion or an abusive litigation demand letter?
13. How do you communicate effectively with client during representation?

C. Practical Guidance (Mentor)

Review:

1. Engagement letter and fee agreement (various forms)
2. Using escrow accounts and accounting for client funds
3. Screening (initially) for conflicts of interest (present and former clients)
4. Withdrawing from the representation
5. Preserving confidentiality
6. Keeping your client informed

II. Acting For Your Client

Implementing the decision : The Lawyer as Advocate and Architect of Future Conduct

A. Basic Concepts:

1. Organization and Management of Legal Work
 - (a) Law office management for small firms or succeeding in the culture of the large firm
 - (b) Economics of practice
 - (c) Time management and delegation to others
 - (d) Providing high quality legal services – that the client can afford
2. Dealing with Others for Your Client:
 - (a) other party's attorney
 - (b) unrepresented parties
 - (c) witnesses
 - (d) third-party decider (judge or other)
 - (e) in-house counsel for corporate client
 - (f) former employees of other party
 - (g) current employees of other party
 - (h) others (senior lawyers) in your firm
 - (i) others (secretaries, staff, paralegals) in your firm
 - (j) courthouse personnel
 - (k) media
 - (l) public

B. Topical Questions

1. What if the client cannot afford to pay for what needs to be done?
2. How do you establish a budget for handling a matter?
3. How do you utilize (and treat) support staff?
4. How do you utilize effectively prior legal work product?
5. How do you attract clients and market your services?
6. How do you deal with difficult people?
7. How do you deal with the lawyer for the other party (to litigation, to a contract negotiation)
8. How do you deal with unrepresented parties, witnesses, etc.?
9. How do you deal with judges (that won't listen)?
10. When you make a mistake (as everyone will) what do you do?

C. Practical Guidance

Review:

1. Calendar and file control systems
2. Record keeping for time and expenses
3. Billing
4. Other aspects of law office management

III. Negotiating For Your Client

The Lawyer as Negotiator

Topical Questions and Practical Guidance

1. How do you prepare for the negotiation of a legal matter (e.g., release of a personal injury claim, lease agreement, etc.)?
 - Gather Information
 - Set Goals
 - Devise Strategy
2. What skills do you need to be an effective negotiator? How can you acquire them?
3. What are the ethical and professionalism obligations of negotiators?
4. When and how should negotiation be initiated?
5. How do you involve the client in negotiation?
6. How do you negotiate with an attorney with years of experience or a friend?

APPENDIX E

MODEL PLAN OF MENTORING ACTIVITIES

AND EXPERIENCES AND PLEDGE

**State Bar of Georgia
Standards of the Profession Committee**

Transition Into Law Practice Program

MODEL MENTORING PLAN OF ACTIVITIES AND EXPERIENCES

Name of Beginning Lawyer: _____

Name of 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 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.

Using this Model Mentoring Plan as a checklist, the Mentor and Beginning Lawyer should jointly develop a Mentoring Plan for the coming year and sign and submit this plan to the Program Director within thirty (30) days after the start of the mentoring year.

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 below)

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.	

C. Introduction to Law Office Management	
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 funds belong to client	
(e) Filing System	
(f) Document Retention Plan	
(g) Calendar and "Tickler" or Reminder System	
(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	

D. Working With Your Client	
1. Discuss Topical Questions and cover items of Practical Guidance set out in Appendix D, Working With Your Client , 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 same firm Mentors and Beginning Lawyers <u>only</u>.	

E.** Mandatory Advocacy Experiences	
<p>For Beginning Lawyers subject to the mandatory Advocacy Experiences requirement, the Mentor should monitor and facilitate the progress of the Beginning Lawyer in observing the following Advocacy Experiences and by discussing, or arranging for another experienced lawyer to discuss, the context and assess the event observed:</p>	
<p>1. An actual or simulated*** deposition of a witness or adverse party in a civil action.</p>	
<p>2. An actual or simulated*** jury trial in a civil or criminal case in either a state or federal court.</p>	
<p>3. An actual or simulated*** non-jury trial or evidentiary hearing, in state or federal court.</p>	
<p>4. An actual or webcast of an appellate argument in the Supreme Court of Georgia, the Court of Appeals of Georgia, a United States Circuit Court of Appeals, or the Supreme Court of the United States.</p>	
<p>5. An actual or simulated*** mediation.</p>	
F. Optional Advocacy Experiences	
<p>1. 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 and provide relevant background context and evaluate what is observed.</p>	
<p>2. 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.</p>	
<p>** Mandatory Advocacy Experiences are required for certain Beginning Lawyers under Rule 8-104(D) of the Rules and Regulations for the Organization and Government of the State Bar of Georgia. Rule 8-104(D) provides that “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”</p> <p>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).</p> <p>*** Simulated advocacy experiences are available on videotape from ICLE.</p>	

G. Closings and Transactional Work	
Arrange for Beginning Lawyer to observe a real estate or other business transaction or financial closing and explain relevant background.	
H. The Obligations of Attorneys to Others	
1. Discuss Topical Questions and cover items of Practical Guidance set out in Appendix D, Acting For Your Client.	
2. Discuss “A Lawyer’s Creed” (attached) and how one as a lawyer can use the law and legal process as “instruments for the common good.”	
I. Negotiation	
1. Discuss pertinent questions raised by the Topical Questions and Practical Guidance in Appendix D, Negotiating for Your Client , 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.	
*** Simulated advocacy experiences are available on videotape from ICLE.	

Mentoring Plan Pledge

The undersigned Mentor and Beginning Lawyer hereby agree upon the Mentoring Plan ("Plan") of activities and experiences set out above. 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 Beginning Lawyer to acquire the practical skills, judgment and professional values to practice law in a highly competent manner.

By signing this Pledge, the undersigned Mentor and Beginning Lawyer pledge that they will devote the time and effort necessary to achieve these goals.

Print Name of Mentor

Date

Sign

Print Name of Beginning Lawyer

Date

Sign

This Mentoring Plan Pledge should be signed by both the Mentor and the Beginning Lawyer and returned to the Program Director within thirty (30) days after the start of the mentoring year.

APPENDIX F

BUDGET

COMMITTEE ON THE STANDARDS OF THE PROFESSION

STATE BAR OF GEORGIA



TRANSITION INTO LAW PRACTICE PROGRAM

ESTIMATED BUDGETS

September 2004

**Standards of the Profession Committee
State Bar of Georgia**

TRANSITION INTO LAW PRACTICE PROGRAM

ESTIMATED BUDGETS

<u>FISCAL YEAR</u>	<u>ESTIMATED BUDGET</u>	<u>TIME TABLE</u>	<u>PAGE No.</u>
July 2004 - June 2005	\$25,140	Preparations for Program, including educating the law schools, bar, judiciary, and employers about the Program; introducing Program to 3 rd Year law students; hiring staff; recruiting mentors; designing curriculum for Enhanced Bridge-the-Gap and Fundamentals of Law Practice Programs; designing Mentor Orientation; developing policies and procedures	1
July 2005 - June 2006	\$250,194	Training of Program Director and Administrative Assistant; Mentor Orientations; assigning and monitoring First and Second Classes of Mentors and Beginning Lawyers; conducting CLE programs; recruiting Mentors, introducing Program to 3 rd Year law students	4
July 2006 - June 2007	\$281,194	Mentor Orientations; assigning and monitoring Third and Fourth Classes of Mentors and Beginning Lawyers; conducting CLE programs; recruiting Mentors; introducing Program to 3 rd Year law students	7
July 2007 - June 2008	\$281,694	Mentor Orientations; assigning and monitoring Fifth and Sixth (<u>if Program is retained</u>) Classes of Mentors and Beginning Lawyers; conducting CLE programs; evaluation of Years 1 (2006) and 2 (2007) of Program; report on evaluation of Years 1 and 2 to Board of Governors and Supreme Court of Georgia	10
July 2008 - June 2009	\$281,694	<u>If Program is retained</u> : Mentor Orientations; assigning and monitoring Seventh and Eighth Classes of Mentors and Beginning Lawyers; conducting CLE programs; recruiting Mentors; introducing Program to 3 rd Year law students	13

TRANSITION INTO LAW PRACTICE PROGRAM

**Estimated Budget
July 2004 - June 2005**

Based on a Population of 2300
(1200 Beginning Lawyers and 1100 Mentors)

A. PERSONNEL*		
1. SALARY	<u>BENEFITS</u>	
2. TECHNICAL SUPPORT SERVICES		◆1,000
B. CLE PROGRAMS (PER ICLE)		
C. CLE FEES (FOR MENTORS)		
D. FACILITIES		7,140
RENT - 400 SQ. FT. @ \$17.85/SQ. FT.	7,140	
E. EQUIPMENT		7,000
1. PURCHASE	7,000	
2. LEASE & MAINTENANCE	*	
3. COPIER USAGE	*	
4. TELEPHONES	*	
F. OPERATING		10,000
1. TELEPHONE SERVICE	*	
2. SUPPLIES	1,000	
3. PRINTING	1,000	
4. POSTAGE	1,000	
5. PREMISES LIABILITY INSURANCE	*	
6. BAR ALLOCATED EXPENSES		
7. MEETINGS AND TRAVEL	2,000	
8. MISCELLANEOUS ○	5,000	
9. FAX USAGE	*	
10. INTERNET SERVICE	*	
11. REPAIRS		
TOTAL EXPENDITURES		25,140
THIS BUDGET DOES NOT INCLUDE COSTS OF PROFESSIONAL LIABILITY INSURANCE FOR THE STATE BAR.		
◆ INFORMATION TECHNOLOGY CONSULTATIONS		
* PROVIDED BY CHIEF JUSTICE'S COMMISSION ON PROFESSIONALISM		
○ INCLUDING HIRING PROCESS EXPENSES FOR PROGRAM DIRECTOR AND ADMINISTRATIVE ASSISTANT		

TRANSITION INTO LAW PRACTICE PROGRAM

2004 - 2005 A
 Estimated Budget
 July 2004 - December 2004

EXPENDITURES		
A.	PERSONNEL*	
	1. SALARY & BENEFITS	
	2. TECHNICAL SUPPORT SERVICES	500
B.	CLE PROGRAMS (PER ICLE)	
C.	CLE FEES (FOR MENTORS)	
D.	FACILITIES	
	RENT	3,570
E.	EQUIPMENT	
	1. PURCHASE	3,500
	2. LEASE & MAINTENANCE	*
	3. COPIER USAGE	*
	4. TELEPHONES	*
F.	OPERATING	
	1. TELEPHONE SERVICE	*
	2. SUPPLIES	500
	3. PRINTING	500
	4. POSTAGE	500
	5. PREMISES LIABILITY INSURANCE	*
	6. BAR ALLOCATED EXPENSES	
	7. MEETINGS AND TRAVEL	1,000
	8. MISCELLANEOUS	2,500
	9. FAX USAGE	*
	10. INTERNET SERVICE	*
	11. REPAIRS	
	TOTAL EXPENDITURES	12,570
THIS BUDGET DOES NOT INCLUDE COSTS OF PROFESSIONAL LIABILITY INSURANCE FOR THE STATE BAR.		
* PROVIDED BY CHIEF JUSTICE'S COMMISSION ON PROFESSIONALISM		

TRANSITION INTO LAW PRACTICE PROGRAM

2004 - 2005 B
 Estimated Budget
 January 2005 - June 2005

EXPENDITURES		
A.	PERSONNEL*	
	1. SALARY & BENEFITS	
	2. TECHNICAL SUPPORT SERVICES	500
B.	CLE PROGRAMS (PER ICLE)	
C.	CLE FEES (FOR MENTORS)	
D.	FACILITIES	
	RENT	3,570
E.	EQUIPMENT	
	1. PURCHASE	3,500
	2. LEASE & MAINTENANCE	*
	3. COPIER USAGE	*
	4. TELEPHONES	*
F.	OPERATING	
	1. TELEPHONE SERVICE	*
	2. SUPPLIES	500
	3. PRINTING	500
	4. POSTAGE	500
	5. PREMISES LIABILITY INSURANCE	*
	6. BAR ALLOCATED EXPENSES	
	7. MEETINGS AND TRAVEL	1,000
	8. MISCELLANEOUS	2,500
	9. FAX USAGE	*
	10. INTERNET SERVICE	*
	11. REPAIRS	
	TOTAL EXPENDITURES	12,570
THIS BUDGET DOES NOT INCLUDE COSTS OF PROFESSIONAL LIABILITY INSURANCE FOR THE STATE BAR.		
* PROVIDED BY CHIEF JUSTICE'S COMMISSION ON PROFESSIONALISM		

TRANSITION INTO LAW PRACTICE PROGRAM

**Estimated Budget
July 2005 - June 2006**

Based on a Population of 2300
(1200 Beginning Lawyers and 1100 Mentors)

A. PERSONNEL		
1. <u>SALARY</u>	<u>BENEFITS</u>	
PROGRAM DIRECTOR 70,000	21,000	91,000
ADMINISTRATIVE ASSISTANT 30,000	9,000	39,000
TOTAL SALARIES AND BENEFITS		130,000
2. TECHNICAL SUPPORT SERVICES		500
TOTAL PERSONNEL		130,500
B. CLE PROGRAMS (PER ICLE)		25,000
C. CLE FEES (FOR MENTORS)		33,000
1100 MENTORS X 3 CLE HOURS FOR ORIENTATION X \$5 PER HOUR CCLC FEE	16,500	
1100 MENTORS X 1 CLE PROFESSIONALISM HOUR X \$15 PER HOUR CJCP FEE	<u>16,500</u>	
	33,000	
D. FACILITIES		7,140
RENT - 400 SQ. FT. @ \$17.85/SQ. FT.	7,140	
E. EQUIPMENT		16,554
1. PURCHASE	11,000	
2. LEASE & MAINTENANCE	1,000	
3. COPIER USAGE	4,554	
4. TELEPHONES	*	
F. OPERATING		38,000
1. TELEPHONE SERVICE	2,000	
2. SUPPLIES	10,500	
3. PRINTING	2,000	
4. POSTAGE	7,000	
5. PREMISES LIABILITY INSURANCE	*	
6. BAR ALLOCATED EXPENSES	1,000	
7. MEETINGS AND TRAVEL	3,000	
8. MISCELLANEOUS	12,000	
9. FAX USAGE	*	
10. INTERNET SERVICE	*	
11. REPAIRS	500	
TOTAL EXPENDITURES		250,194
THIS BUDGET DOES NOT INCLUDE COSTS OF PROFESSIONAL LIABILITY INSURANCE FOR THE STATE BAR.		
* PROVIDED BY CHIEF JUSTICE'S COMMISSION ON PROFESSIONALISM		

TRANSITION INTO LAW PRACTICE PROGRAM

2005 - 2006 A
 Estimated Budget
 July 2005 - December 2005

EXPENDITURES		
A.	PERSONNEL	
	1. SALARY & BENEFITS	65,000
	2. TECHNICAL SUPPORT SERVICES	250
B.	CLE PROGRAMS (PER ICLE)	
C.	CLE FEES (FOR MENTORS)	33,000
D.	FACILITIES	
	RENT	3,570
E.	EQUIPMENT	
	1. PURCHASE	10,000
	2. LEASE & MAINTENANCE	500
	3. COPIER USAGE	2,277
	4. TELEPHONES	*
F.	OPERATING	
	1. TELEPHONE SERVICE	1,000
	2. SUPPLIES	3,000
	3. PRINTING	500
	4. POSTAGE	2,000
	5. PREMISES LIABILITY INSURANCE	*
	6. BAR ALLOCATED EXPENSES	500
	7. MEETINGS AND TRAVEL	1,500
	8. MISCELLANEOUS	6,000
	9. FAX USAGE	*
	10. INTERNET SERVICE	*
	11. REPAIRS	
	TOTAL EXPENDITURES	129,097

THIS BUDGET DOES NOT INCLUDE COSTS OF PROFESSIONAL LIABILITY INSURANCE FOR THE STATE BAR.

*** PROVIDED BY CHIEF JUSTICE'S COMMISSION ON PROFESSIONALISM**

TRANSITION INTO LAW PRACTICE PROGRAM

2005 - 2006 B
Estimated Budget
January 2006 - June 2006

EXPENDITURES		
A. PERSONNEL		
1. SALARY & BENEFITS		65,000
2. TECHNICAL SUPPORT SERVICES		250
B. CLE PROGRAMS (PER ICLE)		25,000
C. CLE FEES (FOR MENTORS)		
D. FACILITIES		
RENT		3,570
E. EQUIPMENT		
1. PURCHASE		1,000
2. LEASE & MAINTENANCE		500
3. COPIER USAGE		2,277
4. TELEPHONES		*
F. OPERATING		
1. TELEPHONE SERVICE		1,000
2. SUPPLIES		7,500
3. PRINTING		1,500
4. POSTAGE		5,000
5. PREMISES LIABILITY INSURANCE		*
6. BAR ALLOCATED EXPENSES		500
7. MEETINGS AND TRAVEL		1,500
8. MISCELLANEOUS		6,000
9. FAX USAGE		*
10. INTERNET SERVICE		*
11. REPAIRS		500
TOTAL EXPENDITURES		121,097
This budget does not include costs of professional liability insurance for the State Bar.		
* Provided by Chief Justice's Commission on Professionalism		

TRANSITION INTO LAW PRACTICE PROGRAM

**Estimated Budget
July 2006- June 2007**

Based on a Population of 2300
(1200 Beginning Lawyers and 1100 Mentors)

A. PERSONNEL		
1. <u>SALARY</u>	<u>BENEFITS</u>	
PROGRAM DIRECTOR 70,000	21,000	91,000
ADMINISTRATIVE ASSISTANT 30,000	9,000	39,000
TOTAL SALARIES AND BENEFITS		130,000
2. TECHNICAL SUPPORT SERVICES		500
TOTAL PERSONNEL		130,500
B. CLE PROGRAMS (PER ICLE)		50,000
C. CLE FEES (FOR MENTORS)		40,500
1100 MENTORS X 3 CLE HOURS FOR ORIENTATION X \$5 PER HOUR CCLC FEE	16,500	
1100 MENTORS X 1 CLE PROFESSIONALISM HOUR X \$15 PER HOUR CJCP FEE	<u>16,500</u>	
	33,000	
100 MENTORS X 12 CLE HOURS FOR OUT-OF-FIRM MENTORSHIPS X \$5	6,000	
100 MENTORS X 1 CLE PROFESSIONALISM HOUR X \$15 =	<u>1,500</u>	
	40,500	
D. FACILITIES		7,140
RENT - 400 SQ. FT. @ \$17.85/SQ. FT.	7,140	
E. EQUIPMENT		6,554
1. PURCHASE	1,000	
2. LEASE & MAINTENANCE	1,000	
3. COPIER USAGE	4,554	
4. TELEPHONES	*	
F. OPERATING		46,500
1. TELEPHONE SERVICE	2,000	
2. SUPPLIES	15,000	
3. PRINTING	3,000	
4. POSTAGE	10,000	
5. PREMISES LIABILITY INSURANCE	*	
6. BAR ALLOCATED EXPENSES	1,000	
7. MEETINGS AND TRAVEL	3,000	
8. MISCELLANEOUS	12,000	
9. FAX USAGE	*	
10. INTERNET SERVICE	*	
11. REPAIRS	500	
TOTAL EXPENDITURES		281,194
THIS BUDGET DOES NOT INCLUDE COSTS OF PROFESSIONAL LIABILITY INSURANCE FOR THE STATE BAR.		
* PROVIDED BY CHIEF JUSTICE'S COMMISSION ON PROFESSIONALISM		

TRANSITION INTO LAW PRACTICE PROGRAM

2006 - 2007 A
 Estimated Budget
 July 2006 - December 2006

EXPENDITURES		
A.	PERSONNEL	
	1. SALARY & BENEFITS	65,000
	2. TECHNICAL SUPPORT SERVICES	250
B.	CLE PROGRAMS (PER ICLE)	25,000
C.	CLE FEES (FOR MENTORS)	40,500
D.	FACILITIES	
	RENT	3,570
E.	EQUIPMENT	
	1. PURCHASE	500
	2. LEASE & MAINTENANCE	500
	3. COPIER USAGE	2,277
	4. TELEPHONES	*
F.	OPERATING	
	1. TELEPHONE SERVICE	1,000
	2. SUPPLIES	7,500
	3. PRINTING	1,500
	4. POSTAGE	5,000
	5. PREMISES LIABILITY INSURANCE	*
	6. BAR ALLOCATED EXPENSES	500
	7. MEETINGS AND TRAVEL	1,500
	8. MISCELLANEOUS	6,000
	9. FAX USAGE	*
	10. INTERNET SERVICE	*
	11. REPAIRS	
	TOTAL EXPENDITURES	160,597
THIS BUDGET DOES NOT INCLUDE COSTS OF PROFESSIONAL LIABILITY INSURANCE FOR THE STATE BAR.		
* PROVIDED BY CHIEF JUSTICE'S COMMISSION ON PROFESSIONALISM		

TRANSITION INTO LAW PRACTICE PROGRAM

2006 - 2007 B
Estimated Budget
January 2007 - June 2007

EXPENDITURES		
A. PERSONNEL		
1. SALARY & BENEFITS		65,000
2. TECHNICAL SUPPORT SERVICES		250
B. CLE PROGRAMS (PER ICLE)		25,000
C. CLE FEES (FOR MENTORS)		
D. FACILITIES		
RENT		3,570
E. EQUIPMENT		
1. PURCHASE		500
2. LEASE & MAINTENANCE		500
3. COPIER USAGE		2,277
4. TELEPHONES		*
F. OPERATING		
1. TELEPHONE SERVICE		1,000
2. SUPPLIES		7,500
3. PRINTING		1,500
4. POSTAGE		5,000
5. PREMISES LIABILITY INSURANCE		*
6. BAR ALLOCATED EXPENSES		500
7. MEETINGS AND TRAVEL		1,500
8. MISCELLANEOUS		6,000
9. FAX USAGE		*
10. INTERNET SERVICE		*
11. REPAIRS		500
TOTAL EXPENDITURES		120,597
THIS BUDGET DOES NOT INCLUDE COSTS OF PROFESSIONAL LIABILITY INSURANCE FOR THE STATE BAR.		
* PROVIDED BY CHIEF JUSTICE'S COMMISSION ON PROFESSIONALISM		

TRANSITION INTO LAW PRACTICE PROGRAM

**Estimated Budget
July 2007 - June 2008**

Based on a Population of 2300
(1200 Beginning Lawyers and 1100 Mentors)

A. PERSONNEL		
1. <u>SALARY</u>	<u>BENEFITS</u>	
PROGRAM DIRECTOR 70,000	21,000	91,000
ADMINISTRATIVE ASSISTANT 30,000	9,000	39,000
TOTAL SALARIES AND BENEFITS		130,000
2. TECHNICAL SUPPORT SERVICES		500
TOTAL PERSONNEL		130,500
B. CLE PROGRAMS (PER ICLE)		50,000
C. CLE FEES (FOR MENTORS)		40,500
1100 MENTORS X 3 CLE HOURS FOR ORIENTATION X \$5 PER HOUR CCLC FEE	16,500	
1100 MENTORS X 1 CLE PROFESSIONALISM HOUR X \$15 PER HOUR CJCP FEE	<u>16,500</u>	
	33,000	
100 MENTORS X 12 CLE HOURS FOR OUT-OF-FIRM MENTORSHIPS X \$5	6,000	
100 MENTORS X 1 CLE PROFESSIONALISM HOUR X \$15 =	<u>1,500</u>	
	40,500	
D. FACILITIES		7,140
RENT - 400 SQ. FT. @ \$17.85/SQ. FT.	7,140	
E. EQUIPMENT		6,554
1. PURCHASE	1,000	
2. LEASE & MAINTENANCE	1,000	
3. COPIER USAGE	4,554	
4. TELEPHONES	*	
F. OPERATING		47,000
1. TELEPHONE SERVICE	2,000	
2. SUPPLIES	15,000	
3. PRINTING	3,000	
4. POSTAGE	10,000	
5. PREMISES LIABILITY INSURANCE	*	
6. BAR ALLOCATED EXPENSES	1,000	
7. MEETINGS AND TRAVEL	3,000	
8. MISCELLANEOUS	12,000	
9. FAX USAGE	*	
10. INTERNET SERVICE	*	
11. REPAIRS	1,000	
TOTAL EXPENDITURES		281,694
THIS BUDGET DOES NOT INCLUDE COSTS OF PROFESSIONAL LIABILITY INSURANCE FOR THE STATE BAR.		
* PROVIDED BY CHIEF JUSTICE'S COMMISSION ON PROFESSIONALISM		

TRANSITION INTO LAW PRACTICE PROGRAM

2007 - 2008 A
 Estimated Budget
 July 2007 - December 2007

EXPENDITURES		
A.	PERSONNEL	
	1. SALARY & BENEFITS	65,000
	2. TECHNICAL SUPPORT SERVICES	250
B.	CLE PROGRAMS (PER ICLE)	25,000
C.	CLE FEES (FOR MENTORS)	40,500
D.	FACILITIES	
	RENT	3,570
E.	EQUIPMENT	
	1. PURCHASE	500
	2. LEASE & MAINTENANCE	500
	3. COPIER USAGE	2,277
	4. TELEPHONES	*
F.	OPERATING	
	1. TELEPHONE SERVICE	1,000
	2. SUPPLIES	7,500
	3. PRINTING	1,500
	4. POSTAGE	5,000
	5. PREMISES LIABILITY INSURANCE	*
	6. BAR ALLOCATED EXPENSES	500
	7. MEETINGS AND TRAVEL	1,500
	8. MISCELLANEOUS	6,000
	9. FAX USAGE	*
	10. INTERNET SERVICE	*
	11. REPAIRS	500
TOTAL EXPENDITURES		161,097
THIS BUDGET DOES NOT INCLUDE COSTS OF PROFESSIONAL LIABILITY INSURANCE FOR THE STATE BAR.		
* PROVIDED BY CHIEF JUSTICE'S COMMISSION ON PROFESSIONALISM		

TRANSITION INTO LAW PRACTICE PROGRAM

2007 - 2008 B
 Estimated Budget
 January 2008 - June 2008

EXPENDITURES		
A.	PERSONNEL	
	1. SALARY & BENEFITS	65,000
	2. TECHNICAL SUPPORT SERVICES	250
B.	CLE PROGRAMS (PER ICLE)	25,000
C.	CLE FEES (FOR MENTORS)	
D.	FACILITIES	
	RENT	3,570
E.	EQUIPMENT	
	1. PURCHASE	500
	2. LEASE & MAINTENANCE	500
	3. COPIER USAGE	2,277
	4. TELEPHONES	*
F.	OPERATING	
	1. TELEPHONE SERVICE	1,000
	2. SUPPLIES	7,500
	3. PRINTING	1,500
	4. POSTAGE	5,000
	5. PREMISES LIABILITY INSURANCE	*
	6. BAR ALLOCATED EXPENSES	500
	7. MEETINGS AND TRAVEL	1,500
	8. MISCELLANEOUS	6,000
	9. FAX USAGE	*
	10. INTERNET SERVICE	*
	11. REPAIRS	500
TOTAL EXPENDITURES		120,597
THIS BUDGET DOES NOT INCLUDE COSTS OF PROFESSIONAL LIABILITY INSURANCE FOR THE STATE BAR.		
* PROVIDED BY CHIEF JUSTICE'S COMMISSION ON PROFESSIONALISM		

TRANSITION INTO LAW PRACTICE PROGRAM

**Estimated Budget
July 2008 - June 2009**

Based on a Population of 2300
(1200 Beginning Lawyers and 1100 Mentors)

A. PERSONNEL		
1. SALARY	<u>BENEFITS</u>	
PROGRAM DIRECTOR		
70,000	21,000	91,000
ADMINISTRATIVE ASSISTANT		
30,000	9,000	39,000
TOTAL SALARIES AND BENEFITS		130,000
2. TECHNICAL SUPPORT SERVICES		500
TOTAL PERSONNEL		130,500
B. CLE PROGRAMS (PER ICLE)		50,000
C. CLE FEES (FOR MENTORS)		40,500
1100 MENTORS X 3 CLE HOURS FOR ORIENTATION X \$5 PER HOUR CCLC FEE	16,500	
1100 MENTORS X 1 CLE PROFESSIONALISM HOUR X \$15 PER HOUR CJCP FEE	<u>16,500</u>	
	33,000	
100 MENTORS X 12 CLE HOURS FOR OUT-OF-FIRM MENTORSHIPS X \$5	6,000	
100 MENTORS X 1 CLE PROFESSIONALISM HOUR X \$15 =	<u>1,500</u>	
	40,500	
D. FACILITIES		7,140
RENT - 400 SQ. FT. @ \$17.85/SQ. FT.	7,140	
E. EQUIPMENT		6,554
1. PURCHASE	1,000	
2. LEASE & MAINTENANCE	1,000	
3. COPIER USAGE	4,554	
4. TELEPHONES	*	
F. OPERATING		47,000
1. TELEPHONE SERVICE	2,000	
2. SUPPLIES	15,000	
3. PRINTING	3,000	
4. POSTAGE	10,000	
5. PREMISES LIABILITY INSURANCE	*	
6. BAR ALLOCATED EXPENSES	1,000	
7. MEETINGS AND TRAVEL	3,000	
8. MISCELLANEOUS	12,000	
9. FAX USAGE	*	
10. INTERNET SERVICE	*	
11. REPAIRS	1,000	
Total Expenditures		281,694
THIS BUDGET DOES NOT INCLUDE COSTS OF PROFESSIONAL LIABILITY INSURANCE FOR THE STATE BAR.		
* PROVIDED BY CHIEF JUSTICE'S COMMISSION ON PROFESSIONALISM		

TRANSITION INTO LAW PRACTICE PROGRAM

2008 - 2009 A
Estimated Budget
July 2008 - December 2008

EXPENDITURES		
A. PERSONNEL		
1. SALARY & BENEFITS		65,000
2. TECHNICAL SUPPORT SERVICES		250
B. CLE PROGRAMS (PER ICLE)		25,000
C. CLE FEES (FOR MENTORS)		40,500
D. FACILITIES		
RENT		3,570
E. EQUIPMENT		
1. PURCHASE		500
2. LEASE & MAINTENANCE		500
3. COPIER USAGE		2,277
4. TELEPHONES		*
F. OPERATING		
1. TELEPHONE SERVICE		1,000
2. SUPPLIES		7,500
3. PRINTING		1,500
4. POSTAGE		5,000
5. PREMISES LIABILITY INSURANCE		*
6. BAR ALLOCATED EXPENSES		500
7. MEETINGS AND TRAVEL		1,500
8. MISCELLANEOUS		6,000
9. FAX USAGE		*
10. INTERNET SERVICE		*
11. REPAIRS		500
TOTAL EXPENDITURES		161,097
THIS BUDGET DOES NOT INCLUDE COSTS OF PROFESSIONAL LIABILITY INSURANCE FOR THE STATE BAR.		
* PROVIDED BY CHIEF JUSTICE'S COMMISSION ON PROFESSIONALISM		

TRANSITION INTO LAW PRACTICE PROGRAM

2008 - 2009 B
Estimated Budget
January 2009 - June 2009

EXPENDITURES		
A. PERSONNEL		
1. SALARY & BENEFITS		65,000
2. TECHNICAL SUPPORT SERVICES		250
B. CLE PROGRAMS (PER ICLE)		25,000
C. CLE FEES (FOR MENTORS)		
D. FACILITIES		
RENT		3,570
E. EQUIPMENT		
1. PURCHASE		500
2. LEASE & MAINTENANCE		500
3. COPIER USAGE		2,277
4. TELEPHONES		*
F. OPERATING		
1. TELEPHONE SERVICE		1,000
2. SUPPLIES		7,500
3. PRINTING		1,500
4. POSTAGE		5,000
5. PREMISES LIABILITY INSURANCE		*
6. BAR ALLOCATED EXPENSES		500
7. MEETINGS AND TRAVEL		1,500
8. MISCELLANEOUS		6,000
9. FAX USAGE		*
10. INTERNET SERVICE		*
11. REPAIRS		500
TOTAL EXPENDITURES		120,597
 THIS BUDGET DOES NOT INCLUDE COSTS OF PROFESSIONAL LIABILITY INSURANCE FOR THE STATE BAR.		
 * PROVIDED BY CHIEF JUSTICE'S COMMISSION ON PROFESSIONALISM		

APPENDIX G

RESOLUTION

STATE BAR OF GEORGIA
Board of Governors
August 19, 2004

RESOLUTION

This resolution authorizes the Committee on the Standards of the Profession to carry into effect the Implementation Plan for a Mandatory Transition Into Law Practice Program dated August 19, 2004. The Implementation Plan calls for the establishment of a mandatory Transition Into Law Practice Program to provide professional guidance and counsel for beginning lawyers through continuing legal education and mentoring by experienced lawyers. The purpose of this Program will be 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.

WHEREAS, on June 13, 1997, the Board of Governors authorized the Committee on the Standards of the Profession (the “Committee”) to conduct a pilot project to test and develop a program of professional guidance for beginning lawyers through continuing legal education and counseling by experienced lawyers who would serve as their mentors, advisors and teachers;

WHEREAS, the Committee completed its pilot project and evaluation thereof and reported its recommendations for a mandatory Transition Into Law Practice Program to the Board of Governors at its meeting on April 5, 2003;

WHEREAS, on November 8, 2003, the Board of Governors accepted the Committee’s Report and Recommendations, approved the concept of a mandatory Transition Into Law Practice Program, and authorized the Committee, on behalf of the State Bar of Georgia, to petition the Supreme Court of Georgia for approval of the concept of a mandatory Transition Into Law Practice Program;

WHEREAS, on November 8, 2003, the Board of Governors further authorized the Committee, in the event the Supreme Court of Georgia approved the concept of a mandatory Transition Into Law Practice Program, to prepare and present to the Board of Governors a detailed plan for establishment of a mandatory Transition Into Law Practice Program;

WHEREAS, on January 7, 2004, the Supreme Court of Georgia accepted the Committee’s Report and Recommendations and approved the concept of a mandatory Transition Into Law Practice Program;

THEREFORE, BE IT RESOLVED THAT:

The Board of Governors hereby accepts the attached Implementation Plan for a Mandatory Transition Into law Practice Program (“Implementation Plan) and proposed amendments to Rule 8-103 (A) and Rule 8-104 (B), (C), and (D) of the Rules and Regulations for the Organization and Government of the State Bar of Georgia (“proposed amendments to Rules 8-103 (A) and Rule 8-104 (B), (C), and (D)”); and

The Board of Governors hereby authorizes the Committee, on behalf of the State Bar of Georgia, to petition the Supreme Court of Georgia for approval of the Implementation Plan and the proposed amendments to Rules 8-103 (A) and Rule 8-104 (B), (C), and (D); and

If the Supreme Court of Georgia approves the Implementation Plan and the proposed amendments to Rules 8-103 (A) and Rule 8-104 (B), (C), and (D), the Board of Governors hereby authorizes the Committee, under the auspices of the Commission on Continuing Lawyer Competency, to carry out the Implementation Plan for a Mandatory Transition Into Law Practice Program. The Program will be funded by an increase in State Bar of Georgia membership dues equal to ten dollars (\$10.00) per member, effective for the Bar year beginning on July 1, 2005.

Approved this 19th day of August, 2004, by the Board of Governors of the State Bar of Georgia.