

Mentor Externship
School of Law



UNIVERSITY OF

St.Thomas

Bringing the Profession to Legal Education

**MENTOR EXTERNSHIP MANUAL
FOR STUDENTS AND MENTORS**

2025-2026

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WELCOME

Welcome law students and mentors to Mentor Externship, a cornerstone of the University of St. Thomas School of Law's curriculum since the school's re-opening in 2001.¹

To our students. This is your program. Whether you came to law school from a career in business or directly from your undergraduate training; grew up in a family of lawyers or are the first in your family to study law; have an established professional or social network; plan to practice law or use your law degree outside the practice of law, Mentor Externship offers you the opportunity to learn what it means to be a member of this learned profession from one of its committed members.

To our mentors. This program depends on your generosity in sharing your gifts. Whether you are a judge, litigator, transactional lawyer, or are engaged outside the practice of law; in-house, in a solo firm or large firm, a non-profit, or other setting; a seasoned lawyer or a more recent member of the profession, you have much to offer your student mentee – the opportunity to learn about the work you do, to benefit from your experience, and to receive your guidance.

Embrace the opportunity to teach the values and ethics of the profession, the importance of relationships, and what it means to be a member of this profession, but also to learn from these newest members of the profession as you guide them along their path.

We have provided this Mentor Externship Manual to help guide your work together in this award-winning program.² We are also here for you. We seek your feedback, welcome your questions, and appreciate how blessed we are to have the opportunity to work with each of you.

Uyen Campbell, Director

Meghan Marrinan Feliciano, Assistant Director

Judie Rush, Mentor Relationship Manager

¹ In an effort to remain a national leader and innovator in legal education, Mentor Externship continues to evolve in response to student, mentor and faculty evaluation as well as employer and client needs. For a history of the program, see Neil Hamilton and Lisa Montpetit Brabbit, *Fostering Professionalism through Mentoring*, 57 J. Legal Educ. 102 (2007); Patrick J. Schiltz, *Making Ethical Lawyers*, 45 S. Tex. L. Rev. 875, 875-89 (2004); David Bateson, *Is Mentoring Worth It?*, University of St. Thomas School of Law 16 (Summer 2010); Lisa Montpetit Brabbit and David Bateson, *Mentors Mind the Legal Gap*, *Legal Times*, Sept. 4, 2006, <https://advance.lexis.com/api/permalink/f39d7374-be8e-46e1-9709-3b8d32a23c1c/?context=1000516>; Doug Stone, *Mentoring the Gap Between Bar and Academy*, University of St. Thomas School of Law 11 (Summer 2010).

² The strong commitment of our mentors that gives every student the opportunity to have mentors throughout their legal education and engage in externship fieldwork has earned the University of St. Thomas School of Law recognition as one of the top three schools in the country for practical training ("Best Schools for Practical Training." National Jurist's Pre-Law. Spring 2025). The program has also earned multiple national awards: Bloomberg Law Top-10 Law School Innovation Program (2024-25), E. Smythe Gambrell Award for Professionalism (American Bar Association, August, 2005), and the Innovation and Excellence in Teaching Professionalism Award (The Conference of Chief Justices and the American Bar Association Professionalism Committee, Honorable Mention, April, 2005).

MENTOR EXTERNSHIP OVERVIEW

Mentor Externship provides each student the unique opportunity to be mentored by and learn from a dedicated legal professional each year of law school. The program has three primary objectives which collectively contribute to the complex and transformative process of integrating a student's core values into their professional decisions and actions, and the lawyer they want to be:

1. To contextualize students' growing knowledge of the law and legal practice;
2. To develop students' relational and emotional intelligence; and
3. To allow students to practice skills required in the legal profession.

To achieve the program's objectives for all its students, the law school has integrated Mentor Externship into its curriculum and requires satisfactory completion of all three years of Mentor Externship for graduation.

Each year, Mentor Externship begins with the placement of each student with a local³ lawyer or judge who introduces the student to the realities of legal practice, and at a more fundamental level, facilitates conversations essential to a student's whole-person formation during each year of study at the University of St. Thomas School of Law.

With their mentors' support, students engage in a four-step⁴ experiential learning process:

1. **Plan.** Each student, in collaboration with their mentor, creates a plan for the year, called the Personal and Professional Development Plan (PPDP). The PPDP allows the student and mentor to focus their time during the year on experiences and topics of conversation that help the student discern their career interests, professional skills, and talents.
2. **Participate, Observe, Create.** By engaging in experiences in the field and in conversations with their mentors, students form professional mentoring relationships and learn the customs, standards, and values of the profession. Students observe or engage in the broad spectrum of the work and professional activities of their mentors, thus experiencing the professional legal world alongside their mentors, to better understand the diverse spectrum of work that lawyers and judges do.
3. **Reflect.** Students contemporaneously log their fieldwork activities, reflecting on their whole-person formation, including the unique roles lawyers play in the community, what they are learning about the profession and themselves, and how their experiences help them define their professional identity and refine their professional development goals.
4. **Integrate.** Students are encouraged to synthesize their learning from both fieldwork and classroom instruction, merging these insights into a cohesive whole-person formation. This process involves not only recognizing and developing the core competencies required in the profession but also internalizing the aspirational standards of a responsible and ethically committed legal professional.⁵

³In addition to the core group of mentors in the Twin Cities Metropolitan area, mentors from around Minnesota and around the country participate in the program with students who may be studying away, participating in an internship elsewhere in the country during law school, or students who desire to establish an additional mentoring relationship in their hometowns or states.

⁴ The organization that follows was inspired by Janel M. Radtke's work on writing business mission statements.

<http://www.tgci.com/podcasts/how-write-mission-statement-janel-m-radtke>

⁵ William M. Sullivan et al, EDUCATING LAWYERS: PREPARATION FOR THE

Fieldwork

A student's fieldwork comprises a large part of the experiential learning process and consists of meetings, contact, and debriefings with their mentor and experiences with their mentor or another attorney or judge.

Each student begins their individual course of learning and fieldwork by mapping out with their mentor a three-part action plan, known as a **Personal and Professional Development Plan (PPDP)**:

1. **Ethics Mission.** The student reflects on their core values and first principles of professionalism and writes an ethics mission to guide their professional actions. The student shares the ethics mission with their mentor.
2. **Experiences.** The student and mentor identify experiences they would like to engage in during the year.⁶
3. **Debriefs.** The student and mentor identify at least two topics to discuss during the year. Topics to discuss in these "debriefs" may be an experience, a template,⁷ another topic related to the legal profession, the student's whole-person formation, or other topic of interest to the mentor and student.

Throughout the year, the student takes the lead in developing the relationship with their mentor by initiating contact, engaging in activities to carry out their plan, and recording all fieldwork activity using Mentor X Log. The mentor facilitates contact by communicating the most effective way to reach them, and by being reasonably available and responsive to the student's communications.

These touchpoints, experiences, and debriefings facilitate the formation of professional relationships that are central to the legal profession and the program. Details of the fieldwork requirements are provided in the "*Student Requirements and Standards of Conduct*" section and a description of fieldwork terminology and record keeping is available at the "*Fieldwork Guide*" section of this Manual.

After all fieldwork is complete (logged and approved), the student conducts a **Year-End Meeting**. The student prints (or prints to PDF) their Mentor X Log, provides it to the mentor, and meets to discuss with the mentor the student's activities during the year. This capstone meeting is an opportunity for the student to demonstrate to the mentor the value the student has received in the mentor relationship.

PRACTICE OF LAW (2007) at 135 (the Carnegie Foundation's 2007 study of legal education). See also Neil W. Hamilton, "Assessing Professionalism: Measuring Progress in the Formation of an Ethical Professional Identity" 5 University of St. Thomas Law Journal (2008) University of St. Thomas Legal Studies Research Paper No. 08-10.

⁶ Students and mentors have a list of experiences available representing a diversity of practice areas and legal skills that correlate with the law school curriculum in each year of study. They can also do experiences together that are not on the list. For more detail, see the "*Experiences*" tab of this Manual.

⁷ A Mentor Externship template is a set of questions designed to facilitate a conversation on a given topic. The templates are set out at the "*Debriefing Templates*" tab of this Manual. Students must have at least one face-to-face debrief conversation with their mentors during each semester, for a minimum requirement of two during the academic year.

Upper-Level Mentor Externship Coursework

In addition to their first-year fieldwork, students take a one-credit Mentor Externship course in each of their second and third years of law school.⁸

These courses integrate students' fieldwork with their mentors, with a classroom component with a faculty mentor⁹ that reinforces the development of the trusted mentor relationship and explores other key relationships lawyers must manage, core competencies, and expectations of the profession.

Mentor Externship courses are "experiential" as defined by the American Bar Association (ABA) and meet the ABA's experiential learning and field placement standards.¹⁰ Key course components include:

1. Fieldwork with their mentor placement, similar to the requirements in 1L year.
2. Feedback and guidance from a faculty mentor throughout the academic year.
3. Small group class meetings integrating students' fieldwork experiences with perspectives and experiences of members of the profession.
4. Written assignments focused on self-assessment, relationship skills, and core professional competencies.

In April, rising 2Ls register for Laws 930 Mentor Externship and rising 3Ls register for Laws 933 Mentor Externship II for Fall of the following year. In November, students register for the same section of Mentor Externship for the Spring semester, so that they continue to meet with the same faculty mentor for their Spring one-on-one meetings.

⁸ The ABA requires that a student successfully complete sufficient prerequisites or contemporaneously receive sufficient training to assure the quality of the student educational experience in a field placement program. Generally, students who have not completed 28 credits at the end of their first year will take Laws 930 in their third year and Laws 933 in their fourth year.

⁹ Faculty Mentors are adjunct faculty drawn from private practice, corporate, public sector, and the judiciary, as well as full-time University of St. Thomas School of Law Faculty and Staff. (See "[Faculty Mentors](#)" at the "Mentor Externship Coursework" tab).

¹⁰ See ABA Standards 303(a)(3), 302, and 305, which can be found at http://www.americanbar.org/content/dam/aba/publications/misc/legal_education/Standards/2015_2016_chapter_3.authcheckdam.pdf

Guided student reflection is assured by the contemporaneous seminar course. The one credit program is based on a 50-hour credit model, with 20 hours allocated to class attendance and preparation, assignments, and faculty mentor meetings, and 30 hours of fieldwork

2025-2026 SUMMARY OF IMPORTANT DATES AND REQUIREMENTS

The following summarizes the Mentor Externship requirements for the 2025-2026 academic year by grade level.

Fieldwork Deadlines are a required part of Mentor Externship and must be completed by the stated date.

Goals are not required, but strongly encouraged to help students stay on track to meet the deadlines.

First-Year (1L) and LLM Students

- ☐ Aug. 15 **Online Orientation:** Complete video and quizzes.
- ☐ Aug. 19 **In-Person Orientation:** Attend at assigned time to receive mentor assignment and log both online and in-person orientations.
- ☐ Sept. 5 **Fieldwork Deadline – Initial Point of Contact:** Contact mentor to introduce yourself and arrange meeting to discuss Personal and Professional Development Plan (PPDP). Log as Point of Contact.
- ☐ Sept. 15 **Fieldwork Goal:** Research mentor. Follow up with mentor if necessary to schedule PPDP Meeting. Draft PPDP in [Mentor X Log](#) and email mentor draft.
- ☐ Sept. 30 **Fieldwork Deadline – PPDP Meeting:** Meet with mentor face to face to review PPDP. Then revise and submit PPDP in [Mentor X Log](#), and log PPDP Meeting
- ☐ Oct. 31 **Fieldwork Goal:** In October, complete and log Point of Contact or Debrief with mentor, and Distinct Experience Type with mentor or another attorney or judge.
- ☐ Dec. 1 **Fieldwork Deadline – Mid-Year Requirement:** Complete and log all Points of Contact with mentor, and a total of at least one face-to-face Debrief with mentor, and two Distinct Experience Types with mentor or another attorney or judge.
- ☐ Jan. 31 **Fieldwork Goal:** In December or January, complete and log a Distinct Experience Type with your mentor or another attorney or judge.
- ☐ Feb. 28 **Fieldwork Goal:** In February, complete and log Point of Contact or Debrief with mentor, and Distinct Experience Type with mentor or another attorney or judge.
- ☐ April 10 **Fieldwork Deadline – Minimum Fieldwork Requirement:** Complete and log in [Mentor X Log](#) total of at least 18 hours, all Points of Contact and two Debrieves with mentor, and four Distinct Experience Types with mentor or another attorney or judge. Email to mentor or print compilation of approved log entries to review with mentor.
- ☐ April 29 **Mentor Appreciation Reception:** Celebrate your year with your mentor.
- ☐ April 30 **Mentor X Log Deadline – Year-End Meeting:** Meet with mentor face to face to review compilation of approved log entries and then submit Year-End Meeting log entry.

While 1L students do not earn academic credit during the first year, successful participation in the program is required to remain in good academic standing and, ultimately, for graduation. (See [“Professionalism and Good Standing”](#) under the [“Student Professional Responsibilities”](#) tab)

Second-Year (2L) and Third-Year (3L) Students

Fall 2025

- ❑ Aug. 25-29 **Ground Rules for Class Discussion and Important Information for Class Assignments** (must be read to open remaining course Canvas modules)
Class One: Setting Your Own Course to the Profession (2L), Setting Your Own Course as a Professional (3L)
Assignment Due Before Class: Introductory (or update) Letter and Resumé (2L and 3L), Wellness Through Efficiency, Revisited (3L)
- ❑ Sept. 2-5 (Sept. 29 for Monday classes) **Class Two:** Building Your Professional Network (2L), Marketing Your Professional Identity (3L)
Assignment Due Before Class: Build Your Networking Plan (2L), Elevator Speech (3L)
- ❑ Sept. 5 **Fieldwork Deadline – Initial Point of Contact:** Email mentor introductory letter and resume and arrange meeting to discuss Personal and Professional Development Plan (PPDP). Log as Point of Contact
- ❑ Sept. 8-12 **Class Three:** Understanding Factors that Shape Our Relationships (2L), Advanced Perspectives in Communicating with Those You Will Serve (3L)
Assignment Due Before Class: World Beyond Your Worldview (2L), Listening When You Disagree (3L)
- ❑ Sept. 15 **Fieldwork Goal:** Research mentor. Follow up with mentor if necessary to schedule PPDP Meeting. Draft PPDP in Mentor X Log and email mentor draft.
- ❑ Sept. 15-19 **Class Four:** Identifying Expectations of the Profession (2L), Managing Expectations in the Profession (3L)
Assignment Due Before Class: Professional Expectations Essay (2L), Managing Expectations (3L)
- ❑ Sept. 22-26 **Class 5:** Your Well-Being as a Legal Professional (2L), Living Your Professional Identity (3L)
Assignment Due Before Class: Wellness Through Efficiency (2L), Living Your Professional Identity Well (3L)
- ❑ Sept. 29 **Monday classes:** make up Class Two (see above, week of Sept. 2-5)
- ❑ Sept. 30 **Fieldwork Deadline – PPDP Meeting:** Meet with mentor face to face to review PPDP. Then revise and submit PPDP in Mentor X Log, and log PPDP Meeting
- ❑ Oct. 31 **Fieldwork Goal:** In October, complete and log Point of Contact or Debrief with mentor, and Distinct Experience Type with mentor or another attorney or judge.
- ❑ Nov. 3-26 **One-on-One Meeting with Faculty Mentor** (prep due before meeting)
- ❑ Dec. 1 **Fieldwork Deadline – Mid-Year Requirement:** Complete and log all Points of Contact with mentor, and a total of at least one face-to-face Debrief with mentor, and two Distinct Experience Types with mentor or another attorney or judge.
- ❑ Jan. 5-30 **One-on-One Meeting with Faculty Mentor** (prep due before meeting)
- ❑ Jan. 31 **Fieldwork Goal:** In December or January, complete and log a Distinct Experience Type with your mentor or another attorney or judge.
- ❑ Feb. 28 **Fieldwork Goal:** In February, complete and log Point of Contact or Debrief with mentor, and Distinct Experience Type with mentor or another attorney or judge.
- ❑ March 2-27 **One-on-One Meeting with Faculty Mentor** (prep due before meeting)
- ❑ April 10 **Fieldwork Deadline – Minimum Fieldwork Requirement:** Complete and log in Mentor X Log total of at least 30 hours, all Points of Contact and two DebrieFs with mentor, and five Distinct Experience Types with mentor or another attorney or judge. Email to mentor or print compilation of approved log entries to review with mentor.
- ❑ April 29 **Mentor Appreciation Reception:** Celebrate your year with your mentor.
- ❑ April 30 **Mentor X Log Deadline – Year-End Meeting:** Meet with mentor face to face to review compilation of approved log entries and then submit Year-End Meeting log entry.

STUDENT REQUIREMENTS

Legal professionals must manage many varied professional relationships, deadlines, and obligations while complying with multiple rules and statutes that govern their professional responsibilities and conduct.

Similarly, as students work to manage their mentor relationships and meet Mentor Externship deadlines and requirements, they must comply with the Minnesota Rules of Professional Responsibility and the Supervised Practice Rules. (See *“Confidentiality, Attorney-Client Privilege, and Avoiding Conflicts of Interest”*) Additionally, they must comply with the University of St. Thomas School of Law’s Academic Policy and specifically the Code of Student Responsibility contained within the Academic Policy.¹¹

University of St. Thomas School of Law’s Academic Policy

The University of St. Thomas School of Law’s Academic Policy Manual Rule III-A-1 provides that satisfactory completion of all requirements associated with Mentor Externship is necessary to earn the JD degree.

For 1L students, satisfactory completion of Mentor Externship requirements involves satisfactory completion of 18 hours of fieldwork, including two debriefings with their mentor and four distinct experience types with their mentor or another attorney or judge.

For 2L and 3L students, satisfactory completion of Mentor Externship requirements involves receiving a passing grade for their Laws 930 and Laws 933 coursework. 2L and 3L students register for 0.0 credits of Mentor Externship Laws 930/933 for the Fall semester and register for 1.0 credit of Mentor Externship Laws 930/933 for Spring semester. Students must pass both Fall and Spring semester coursework to earn 1.0 credit at the end of the academic year. Under the law school’s Academic Policy for externship courses, completion of 50 hours of field placement, preparation and classroom responsibilities are required for each credit hour awarded.

To receive a passing grade, 2L and 3L students must complete the following each year:

1. Attend all Mentor Externship classes and all one-on-one meetings with faculty mentor. (Students must contact their faculty mentor as far in advance as possible to address any potential conflicts with scheduled classes or meetings. (See *“Extensions and Other Communication Guidance”*))
2. Read assigned materials and complete required class preparation.
3. Complete and submit course assignments to Laws 930/933 Course Canvas unless otherwise instructed by student’s faculty mentor.
4. Complete and log all fieldwork, including Personal and Professional Development Plan, 30 fieldwork hours, two debriefings with mentor, five distinct experience types with mentor or another attorney or judge, and year-end meeting.
5. Meet Mentor Externship deadlines and review, correct, and resubmit Mentor X Log entries as necessary. (See *“Extensions and Other Communication Guidance”*)
6. Effectively manage Mentor Externship relationships, including initiating and responding to communication with mentor and Mentor Externship Team.

¹¹ The University of St. Thomas-School of Law’s Code of Student Responsibility is available on page V-60 of the [Academic Policy Manual](#).

Students missing any two of the following with no advance communication with their faculty mentor or a Mentor Externship director may result in a failing grade:

- Class meetings
- Classroom assignments
- Fieldwork deadlines

For a detailed description of the topics and assignments covered, see the *“Mentor Externship Coursework”* section of this manual.

Failure to perform the requirements of the program has serious academic consequences, including:

- Academic probation and loss of good standing
- Loss of certification under the Minnesota Supervised Practice Rules
- Loss of scholarship
- Loss of extracurricular opportunities
- Inability to graduate

University of St. Thomas School of Law’s Code of Student Responsibility

According to the University of St. Thomas School of Law’s Code of Student Responsibility, “Because students in the School of Law are preparing for careers in a profession demanding honesty and integrity, the School of Law requires high standards of conduct.” (Academic Policy V-5. Code of Student Responsibility: Honor Code.)

In the context of Mentor Externship, students must meet the legal profession and the School of Law’s demand for honesty and integrity in their Mentor X Log submissions, including accurate certifications in their Personal and Professional Development Plan (PPDP), PPDP Meeting log entry, and Year-End Meeting log entry.

Personal and Professional Development Plan (PPDP).

I understand I will be certified as a student observer under Minnesota Supervised Practice Rule 2E.

I certify that I have read Rule 1.6 of the Minnesota Rules of Professional Conduct, and I will maintain confidentiality and will ensure that I am identified as a student to any client and accepted by them.

(Review the *“Confidentiality, Attorney-Client Privilege, and Avoiding Conflicts of Interest”* section of the manual so you can make the necessary student observer certification.)

I understand that I am responsible for the content and accuracy of all submissions in connection with Mentor Externship and that any submission I make that is false or misleading, and any dishonesty or violations of the rules governing my responsibilities in the program may constitute ‘academic misconduct’ in accord with the University of St. Thomas School of Law Code of Student Responsibility.”

(Applicability of Code of Student Responsibility)

Personal and Professional Development Plan (PPDP) Meeting Log Entry.

I certify that I have met face-to-face with my mentor (or that I have been given express, advance permission by the director to communicate with my mentor in a different manner), and that I have reviewed and discussed this PPDP with my mentor.

Year-End Meeting Log Entry

All my minimum required fieldwork was completed, logged, and approved in advance of my year-end meeting with my mentor.

I met face-to-face with my mentor (or I was given express, advance permission by a program director to communicate with my mentor in a different manner).

I provided my mentor with a copy of my Mentor X Log and discussed it with my mentor.

I have not logged and received credit for activity that I am not allowed to receive credit for as described in the "Student Professional Responsibilities" section of the Mentor X Program Policy Manual.

All my Mentor X Log entries are true and correct.

A student may violate the Code of Student Responsibility even if a student's misrepresentation or inaccurate statement is not intentional. To ensure compliance with these standards, students must:

1. Become familiar with the requirements of the course and accompanying fieldwork.
2. Ensure the dates, times, and other details in log entries are accurate.
3. Carefully read the content of the statement to which they are certifying "yes" or "no."
4. Do not check off "yes" or "no" unless it is an unequivocal "yes" or "no" to the entire statement. "Yes, but" or "No, except" is not unequivocal.
5. Seek guidance from the Mentor Externship director if they have questions about course requirements or to request permission to be exempted from a requirement.

Examples of conduct that violates the Code of Student Responsibility:

1. A student saves their final PPDP, checking off that they met face-to-face with their mentor. In fact, they have not met with their mentor.
2. A student logs an event indicating that they attended an appellate court argument. In fact, they watched a recording of the argument on the internet.
3. A student logs a "debrief" and checks off that their mentor was present. The log describes a conversation the student had with a lawyer who is not the student's mentor and identifies that lawyer.
4. A student logs a "debrief" and checks off that the student's mentor was present. In fact, their mentor was out of the country, so they talked on the phone. The student did not get permission in advance to do a debrief that was not face-to-face with the mentor and did not disclose the circumstances in their entry. The entry was approved based on the false assertion.

Extensions and Other Communication Guidelines

When circumstances change, either due to something within or outside their control, legal professionals must take timely and professional action, including communicating with the necessary parties such as opposing counsel, a client, or a court. As such, legal professionals need excellent attention to detail and relationship, communication, and time management skills.

Developing these skills is vital to being successful in the legal profession and students will be able to practice and sharpen these skills in managing their Mentor Externship requirements.

If a student is unable to meet a Mentor Externship deadline for any reason, the student must request an extension from a Mentor Externship director (or their faculty mentor if the deadline pertains to their Laws 930/933 classroom requirements).

To request an extension in the profession, students would want to follow this standard practice:

1. Make the request in advance of the impending deadline;
2. Identify the circumstance that will or may result in an inability to meet a deadline; and
3. Respectfully propose a different deadline.

Applying this practice to Mentor Externship, a student should:

1. Reach out to their mentor in advance of the impending deadline to identify the circumstance that will or may result in an inability to meet a deadline and to propose a different meeting date.
2. While waiting to hear back from the mentor, the student should reach out to a Mentor Externship director (again in advance of the impending deadline) to identify the circumstance that will or may result in an inability to meet a deadline, to let the director know the mentor has been contacted, and to propose a different deadline that is a couple of days after the date proposed to the mentor.
3. Once the different meeting date has been confirmed with their mentor (be sure to follow up as necessary to confirm), email the Mentor Externship director to provide the new meeting date and to confirm an extension.

PRACTICE TIP: If a student's action or inaction causes difficulty for someone else or a missed deadline, an acknowledgement or an apology can go a long way in protecting the student's reputation.

We want students to succeed in Mentor Externship and in the profession and we are here to help. If a student has questions about what the program requires or is having a difficult time managing their responsibilities or mentor relationship, the student should **contact us right away**. Students are also encouraged to contact the *Director of Academic Achievement* or *University of St. Thomas Counseling Services*.

Disallowed Activities

In order to meet ABA standards for externships and the objectives of Mentor Externship, the following activities will not receive fieldwork credit:

1. Double-billing.
 - a. Any activity for which students earn monetary compensation.
 - b. Any activity which is required for course credit, including for Mentor Externship classroom component or any other law school course.
 - c. Any activity which is logged for public service hours.

- d. Any activity that is a required component of law school extracurricular activities (e.g., law journal member's required attendance at law journal symposium).

If students do not receive compensation or credit for an activity that otherwise qualifies as Mentor Externship fieldwork, the activity may be logged for Mentor Externship credit.

2. On-campus Activities.
 - a. On-campus seminars, lectures, or speakers, such as on-campus presentations from Career and Professional Development, Student Organizations, the Holloran Center, the Prolife Center, and the Murphy Institute, or other groups or departments that are not Continuing Legal Education (CLE) programs or Networking events (i.e. individual conversations) with lawyers or judges.
3. Activities Outside of the Academic Year.
 - a. Time logged for fieldwork activities, other than Orientation, that occurred before the first day of Fall semester or after the minimum fieldwork deadline, absent director approval.
4. Activities Inconsistent with Mentor Externship Objectives and Requirements.
 - a. Experiences that do not involve presence or supervision of a mentor, or the presence of another lawyer, judge, or other individual approved by the director.
 - b. Experiences with University of St. Thomas faculty or staff.
 - c. Experiences that the student did not attend live (in real time, i.e. no recordings).
 - d. PPDP Meeting, Debrief, or Year-End Meeting that is not face-to-face, without advance permission of the director.
5. Activities logged more than 90 days after their occurrence
 - a. Mentor Externship gives students a soft introduction to attorney billing practices. Work must be logged in a timely manner – for purposes of Mentor Externship, work must be logged within 90 days.

Students are required to certify at the time they submit their Year-End Meeting log that they have not received credit for any activities that are “disallowed activities.” It is each student’s responsibility to ensure that this certification is made accurately. Receiving credit for activities that are not allowed and making a false certification are independent violations of the Code of Student Responsibility.

Class Absences for Mentor Externship Fieldwork

University of St. Thomas School of Law’s Academic Policy Manual Section III-C-7 (E)(1) allows students to be absent from one class per course per semester to attend a Mentor Externship activity:

E. Excused Absences

1. Mentor Externship Absences. Each student is entitled to miss one class session per course per semester, with advance notice to the instructor, in order to attend a mentor activity. Instructors shall define in the course syllabus a reasonable amount of advance notice and any circumstances under which a student may not miss a specific class (for instance, because a student’s absence in class would disrupt the objectives of the class or put a client at a disadvantage). This policy does not apply to intensive courses taught between semesters or in the fall before regular classes begin. Students are not entitled to miss a class under this policy if missing the class for a mentor activity would result in the student missing a total of 20% or more of a course’s in--class time. Notwithstanding §§ III-C-5-C & D above, no instructor may penalize a student for electing to miss class in accordance with this policy, so

long as the student complies with the syllabus, including completing all required class assignments (which may include assignments involving in class participation) and all quizzes or assessments.

This policy recognizes that a student's Mentor Externship fieldwork is as important to a student's education as other coursework. It also recognizes the need for a student to manage their busy class schedule while accommodating the mentor's busy schedule to take advantage of mentoring opportunities. At the same time, it recognizes the need for students to communicate with the course instructor in a timely manner and not schedule an activity in conflict with a class that an instructor has specified cannot be missed in the syllabus.

MENTOR GUIDANCE AND ACTIVITIES

Almost 600 lawyers and judges participate in the program annually, working with a student body of approximately 500 students. The program has developed a core group of committed professionals who invest in the future of the profession and help their students achieve their personal and professional goals and the objectives of Mentor Externship.

The following serves to guide mentors in the invaluable work they do with their students.

Mentor Guidance

1. Meet with your mentee before **September 30, 2025** to discuss and complete with your mentee a Personal and Professional Development Plan (See *"PPDP"* tab).¹²
2. Discuss with your mentee how to best communicate with you to schedule activities and respond to communications from your mentee.
3. Commit approximately 15-18 hours (approximately two hours per month) to mentoring your mentee during the school year (August-April).
4. Debrief (discuss) with your mentee two or more topics during the year (at least one of which should occur prior to **December 1, 2025**), which may be a conversation following an experience, a debriefing template, or a conversation about another topic. (See *"Debriefing Templates"* for examples).
5. Complete two to five experiences with your mentee during the year. (See *"Identified Experiences"*).
6. Meet with your mentee to review and discuss the mentee's completed Mentor X Log¹³ by April 30, 2026.

¹² Students certify that they have met and discussed the PPDP with the mentors; mentors do not sign the PPDP.

¹³ At the end of the year, each student prints their log and provides a copy to their mentor for review and discussion. This is a face-to-face meeting unless the Mentor Externship Director has made an exception to accommodate the needs of the mentor or other exigent circumstances.

Common Mentoring Activities

Observation. Observing lawyering activities is a common model for exposing mentees to the profession. This opportunity can be enhanced (and often qualifies as a separate experience type) when the mentee prepares for an observation by researching relevant substantive law or procedural rules, reviewing pleadings or other documents or sources, or discussing in advance how the mentor prepares for the activity. For observational experiences, students must also share their reflections and questions with mentors or another attorney or judge *after* the activity, to help them understand what they observed.

Real World Simulation. The mentee may not have had an opportunity to undertake any type of lawyering activity or experiences related to the legal profession. In some instances, the activity can be “replicated” to simulate work activity. Examples include drafting documents for closed client matters, closed files, or work product already completed. Mentors can provide the same instruction for the mentee that they would for a first-year associate or judicial law clerk. Comparing the mentee draft to the final product can provide a teaching opportunity. As another example, a mentee may prepare their own set of deposition questions, direct examination questions, or arbitration questions. Real world simulation in the program allows the mentee to stand in the shoes of the mentor or other lawyer who has already, or contemporaneously, completed the work.

Work Product. Mentees can be given manageable assignments with close supervision from the mentors. For example, mentees can conduct research, write memorandums or briefs, summarize depositions, or draft documents for the mentor. Mentees cannot be compensated for this activity.

Professional Activities. Mentees enjoy attending professional activities such as bar association meetings, charitable or social events, and educational programs. These activities give the mentee an appreciation of how lawyers contribute to the profession and the community and the importance of relationships in the profession.

Supervising and Providing Feedback to Mentees

Supervision. The mentee’s activities and communications with the mentor provide the mentee with core opportunities to gain lawyering experiences and be mentored and for mentors to have a meaningful mentor experience. By working with the mentee to plan activities for the year, engaging in activities during the year, and closing the year with a review of the mentee’s fieldwork log, the mentor guides the process and oversees the mentee’s fieldwork, including the supplemental activities a mentee may do in the field with other lawyers and judges. Mentors are not expected to drive the process or enforce deadlines. However, a mentor’s willingness to encourage the mentee’s regular communication and follow through can help the mentee learn how to be a good mentee and make mentoring a rewarding experience for both mentor and mentee.

Feedback. As the mentee’s trusted guide, the mentor is in an optimal position to observe the mentee in a professional setting and provide feedback to assist the mentee in learning the expectations of the profession and the skills needed to serve others well and be successful in the profession. While giving feedback isn’t always comfortable or easy, the positive and lasting impact it can have on a mentee is worth the risk. Good feedback is:

1. **Timely.** Mentors are encouraged to take the opportunity when a “teachable moment” arises. The timing should take into account the mentee’s ability to listen and receive feedback and the mentor’s ability to know what to say.
2. **Honest.** Mentees deserve feedback (both positive and negative) and do not benefit from false praise or receiving a “pass” on professional obligations.

3. **Encouraging.** Feedback should be given in private, respectfully, and with kindness and appreciation for the feelings of the mentee.
4. **Focused.** The mentor's feedback should focus on the mentee's skills and competencies and should be based on the mentor's observations, experience, and knowledge.
5. **Balanced.** Acknowledge the mentee's strengths and successes alongside opportunities for growth. Highlight the mentee's skills that are well-developed, as well as those that are less developed.
6. **Without Judgment.** Focus on guiding or teaching the mentee rather than naming or attributing a reason for the conduct. A mentee who is not making regular contact with the mentor or managing obligations in an effective manner isn't necessarily showing a lack of commitment. Be open to the opportunity to better understand the mentee.
7. **Constructive.** In addition to feedback, mentors are encouraged to give advice, share ideas, and offer opportunities for mentees to develop a skill or address a concern.

The Mentor Externship Directors serve as a resource for mentors who wish to provide feedback to mentees. Mentors are encouraged to share with the Mentor Externship Directors their observations or concerns regarding the mentee that can be used to provide feedback or assist the mentee.

Activities for Mentors

Mentors are an integral part of the University of St. Thomas School of Law community, and we invite their participation in its activities. Please contact the Mentor Director with any questions on how to take advantage of these opportunities.

Mentor Appreciation Reception. Mentor Externship has a reception at the end of each academic year (April/May) to honor mentors and celebrate the end of a successful year with mentors, mentees, faculty, and staff. Mentors receive the date at the beginning of the year and receive both a "save the date" and an invitation closer to the event.

Continuing Legal Education (CLE). Mentors can earn CLE credit from programs offered by the University of St. Thomas School of Law. These CLE programs are free or offered at a significantly reduced rate as a show of appreciation for the mentor's service in the program.

Details about CLEs, symposia, programs and events are provided on our [Become a Mentor](#) web page, under Mentoring Benefits.

Program and Coursework. Mentors are encouraged to offer their mentees insight on classroom topics and assignments. Mentors who have an experience they would like to share with a group of students or wish to contribute in other ways should contact the Mentor Director at any time.

Debrief Templates and Experiences. Mentors are encouraged to suggest experiences or develop templates in their practice areas for inclusion in these materials. (See ["Experiences"](#) and ["Debriefing Template"](#) sections for examples).

MENTOR AND MENTEE STANDARDS OF CONDUCT

The mentor-mentee relationship is a mutually beneficial relationship in which an experienced lawyer or judge supports the professional formation of a law mentee by modeling professional behavior, providing experiences in the field, and providing the mentee guidance in their journey to the profession. Through the relationship, the mentee learns what it means to be a lawyer through engaging in learning opportunities with the mentor, asking questions, listening, and sharing ideas with the mentor. This professional relationship requires a high level of trust and mutual respect.

Managing Differences in the Relationship. Our students are placed with mentors based on student interests, background, areas of study, and other factors. While mentors and mentees all share the critical experience of attending law school and are likely to have much else in common, no mentor and mentee will have the same shared experiences. Additionally, mentors and mentees are commonly from different generations, and may not share the same ethnicity, race, gender, or nationality.

Communication is Key. Because misunderstandings commonly occur between people of different generations, it is important for the mentor and mentee to talk about their assumptions and values to avoid misunderstanding. Similarly, if the mentor and mentee are of different ethnicity, race, gender, or nationality, both should consider their cultural assumptions and values and discuss them to better understand one another and avoid miscommunication. Each should strive to respect the other's perspective, even if it different than their own.

Observing Professional Boundaries. The range of activities that mentors and mentees can engage in is broadly defined to allow for optimum flexibility in meeting the professional development needs of the mentee and the mentoring style of the mentor. Mentoring can occur in many settings and across many activities. Examples:

Mentors and mentees may meet for debriefs in the mentor's office, a coffee shop, a restaurant, or at the law school. In addition to observing and doing legal work, experiences commonly include attending bar association meetings or events, educational, and/or other professional functions in addition to experiences together.

Mentors and mentees might attend an exercise class, a charity golf event, or have lunch. Mentor activities commonly happen during the business day but might also occur after work or on a weekend.

Any setting is appropriate as long as it is in keeping with a professional relationship and is comfortable for both the mentor and mentee.

Comfort is Key. In any relationship, the individuals involved must communicate about their boundaries of what is and what is not comfortable. It is particularly important, given the inherent imbalance of power given the mentor's enhanced experience, knowledge, professional status, and collegial network, that the mentee feel comfortable. Both mentor and mentee should communicate with the other regarding their personal boundaries and should communicate discomfort or a crossed boundary to the other.

While personal boundaries can differ, mentors and mentees are expected to observe the following boundaries:

- **Personal Space.** Do not cross into the mentee or mentor's personal space without permission.
- **Personal Matters.** Do not ask overly personal questions or discuss personal matters that may be embarrassing or uncomfortable for the other person.
- **Personal Settings.** Do not meet alone in an intimate setting.

Non-Discrimination. The University of St. Thomas is committed to the principles of equal educational opportunity and non-discrimination on the basis of race, color, creed, religion, national origin, sex, sexual orientation, family status, disability, age, marital status, status with regard to public assistance, membership or activity in a local commission, genetic information, or any other characteristic protected by applicable law.¹⁴

Further, Mentor Externship is committed to providing an inclusive, welcoming, and safe environment for our mentors and our mentees. Consequently, the following conduct is prohibited:

- Intimate conduct or sexual relationships between a mentor and mentee
- Discrimination on the basis of sex, which includes sexual harassment (unwelcome advances of a sexual nature) and sexual violence
- Discrimination on the basis of race, color, creed, religion, national origin, sexual orientation, family status, disability, age, marital status, status with regard to public assistance, membership or activity in a local commission, genetic information, or any other characteristic protected by applicable law

Mentor Directors are resources for mentors and mentees to help manage communication, provide boundary guidance, or to address difficulties or concerns that arise. The University also has established contacts regarding its sexual misconduct and anti-discrimination policies which can be accessed using the links below.

Resources

St. Thomas' Sexual Misconduct Policy. <https://www.stthomas.edu/title-ix/sexualmisconduct/>

St. Thomas' Equal Opportunity Statement and Notice of Discrimination.

<https://www.stthomas.edu/media/officeofgeneralcounsel/policies/Equal-Opportunity-Statement-and-Notice-of-Nondiscrimination.pdf>

"Mentoring Across Differences: A guide to Cross-Gender and Cross-Race Mentoring" Minority Corporate Counsel Association. <https://www.mcca.com/wp-content/uploads/2017/04/Book7-Yellow.pdf>

Kathy Gurchief, "7 Essential Guidelines for Mentoring in the Post-Weinstein Era."

<https://www.shrm.org/resourcesandtools/hr-topics/behavioral-competencies/pages/guidelines-for-mentoring-in-the-postweinstein-era.aspx>

¹⁴ The Minnesota Rules of Professional Conduct prohibits unlawful harassment in connection with the lawyer's professional activities (which includes mentoring) as well as discriminatory acts prohibited by federal, state, or local statute that reflects adversely on the lawyer's fitness as a lawyer. (See Minn. R. P. Conduct 8.4(g)(h)).

CONFIDENTIALITY, ATTORNEY-CLIENT PRIVILEGE, AND AVOIDING CONFLICTS OF INTEREST

Protecting Confidentiality and Privilege in the Mentoring Relationship

Mentors should carefully consider their mentee's access to confidential information.

The [Minnesota Supervised Practice Rules](#) protect attorney-client privilege and work product privileges in the mentor-mentee relationship by certifying students as "student observers"¹⁵:

"Student Observer" means a student certified under these Rules to observe any and all professional activities of a member of the bar as part of an academic program or course for academic credit, including client communication. Communication between the client and the student shall be privileged under the same rules that govern attorney-client privilege and work product doctrine, and the presence of a student during communication between the lawyer and the client shall not, standing alone, waive these evidentiary privileges.

Minn. Supervised Prac. R 2E (2020). Students must be in good academic standing, certified in connection with an academic program or course for credit, and sign a statement certifying they will maintain confidentiality required of lawyers by Rule 1.6 of the Minnesota Rules of Professional Conduct. Minn. Supervised Prac. R. 5B (2020). (See "[Minn. Rule of Professional Conduct 1.6](#)" below.)

Mentors, as supervising attorneys, are required by the Rule to ensure that their mentees are (1) identified as a student and accepted by the client; and (2) have signed a statement certifying they maintain the confidentiality that a lawyer is required to maintain under Rule 1.6 of the Minnesota Rules of Professional Conduct. See Minn. Supervised Prac. R 5B (2020).

Mentors can be assured that their mentees are in good academic standing, have read Rule 1.6 and have certified in their Personal and Professional Development Plan (PPDP) that they will maintain confidentiality under the Rule, and have been certified in connection with Mentor Externship. If a student has not been certified under the Rule for any reason, their mentor will be contacted by a Mentor Externship director.

Mentors are encouraged to discuss confidentiality and privilege with mentees. The discussion provides an opportunity to teach mentees about the duty of confidentiality and the attorney-client and work product privileges and how they are protected in practice, how to ensure clients and others understand the role, and the need to be aware of potential or perceived conflicts of interest.

These student observation rules¹⁶ play an important role in permitting law students to observe a broader spectrum of the legal profession, improving the caliber of legal education and legal services provided in the future. Prior to the adoption of these provisions, the attorney-client privilege was arguably waived when a law student observed a communication between

¹⁵ If mentors have opportunities for their 2L or 3L mentee to assist in representation, mentors can reach out to the Mentor Externship Team and we can help obtain student practitioner certification for the student. Student practitioner certification is specific to the supervising attorney, and not transferrable to a different supervising attorney.

¹⁶ The student observation protections were initially adopted in the Spring of 2009 as Minnesota Practice Rule 3. Senior Assistant Dean Lisa Montpetit Brabbit, former Director of Mentor Externship and Dean of Students David Bateson, and Christina Hilleary ('09) assisted the Minnesota State Bar Association in its [Petition to the Minnesota Supreme Court](#) for the adoption of Rule 3. We are grateful to Dean Brabbit and Dean Bateson for their many contributions to the advancement of legal education and the Mentor Externship Program.

an attorney and the attorney's client because the law student was not "essential" to the communication...¹⁷ Mentors were understandably hesitant to allow mentees to observe their communications with clients or to discuss case strategy with them, to avoid the risk that a mentee could be called as a witness to testify regarding these confidential communications. Mentees' inability to observe attorney-client communications interfered with the skill development and professional formation of new attorneys...¹⁸ The exclusion prevented mentees from observing, analyzing, and internalizing some of the most important professional skills associated with the administration of justice: navigating the attorney-client relationship...¹⁹ The current rules assure that these opportunities are available to mentees in a professional and supervised setting.

The adoption of these protections also provided an opportunity to improve legal education. According to the MacCrate Report,²⁰ law students are widely perceived to be incapable of performing some of the essential functions of the profession upon their graduation from law school...²¹ Like the MacCrate Report, the Carnegie Report²² emphasizes the importance of an interdependent connection between professional education and the profession.

The protections allow mentors to use their creativity and increase opportunity for the benefit of their mentee through exposure to a vast array of activities within the attorney-client relationship,

Mentors may have particular confidentiality concerns or guidelines which they should discuss with their mentees. [A Sample Confidentiality Agreement](#) follows which can be used before mentees become privy to a variety of confidential information, such as clients, firms, marketing, finances, etc.

Minn. Rule of Professional Conduct 1.6 Confidentiality of Information

¹⁷ 8 JOHN H. WIGMORE, EVIDENCE IN TRIALS AT COMMON LAW § 2300 at 581(8th ed. 1961) ("[A] mere student at law, aspiring to future entrance to the profession, is without the privilege, however much legal skill he may possess in comparison with some of those who are within it.") (citing *Andrews v. Soloman*, 1 Fed. Cas. 899, 901 (No. 378) (C.C. Pa. 1816); *Barnes v. Harris*, 61 Mass. (7 Cush.) 576 (1851); *Schubakagel v. Dierstein*, 131 Pa. 46, 54, 18 Alt. 1059, 1060 (1890); *Holman v. Kimball*, 22 Vt. 555 (1850)). For a detailed analysis of the intersection between law students and the attorney-client privilege, see Ursula H. Weigold, *The Attorney-Client Privilege as an Obstacle to the Professional and Ethical Development of Law Students*, 33 PEPP. L. REV. 677 (2006).

¹⁸ See, e.g., John Sonsteng & David Camaretto, *Minnesota Lawyers Evaluate Law Schools, Training and Job Satisfaction*, 26 WM. MITCHELL L. REV. 327, 334-39 (2000) (A survey of law graduates in Minnesota isolated seventeen different skill areas for successful practice. Far more than half of all respondents perceived these skills as important to practice, yet in nine of the seventeen areas, more than fifty percent of respondents did not believe they were well-prepared after graduation. Some of the most important areas in which law graduates perceived themselves as unprepared were negotiation, counseling, drafting legal documents, the ability to diagnose and plan solutions for legal problems, and the ability to obtain and keep clients.)

¹⁹ See Patrick Schiltz, *Legal Ethics in Decline: the Elite Law Firm, the Elite Law School, and the Moral Formation of a Novice Attorney*, 82 MINN. L. REV. 705, 709 (1998); Patrick Schiltz, *Making Ethical Lawyers*, S. TEX. L. REV. 875, 877-878 (2004) (argues that new lawyer professional formation is advanced through observing and dialoguing with senior lawyers who model ethical lawyering).

²⁰ ABA Section of Legal Education & Admissions to the Bar, *Legal Education and Professional Development An Educational Continuum: Report of the Task Force on Law Schools and the Profession: Narrowing the Gap* (1992) (known as the "MacCrate Report" named for Robert MacCrate, Esq., chair of the taskforce).

²¹ Id.

²² William M. Sullivan, et al., *Educating Lawyers: Preparation for the Profession of Law* (2007).

(a) Except when permitted under paragraph (b), a lawyer shall not knowingly reveal information relating to the representation of a client.

(b) A lawyer may reveal information relating to the representation of a client if:

- 1) the client gives informed consent;
- 2) the information is not protected by the attorney-client privilege under applicable law, the client has not requested that the information be held inviolate, and the lawyer reasonably believes the disclosure would not be embarrassing or likely detrimental to the client;
- 3) the lawyer reasonably believes the disclosure is impliedly authorized in order to carry out the representation;
- 4) the lawyer reasonably believes the disclosure is necessary to prevent the commission of a fraud that is reasonably certain to result in substantial injury to the financial interests or property of another and in furtherance of which the client has used or is using the lawyer's services, or to prevent the commission of a crime;
- 5) the lawyer reasonably believes the disclosure is necessary to rectify the consequences of a client's criminal or fraudulent act in the furtherance of which the lawyer's services were used;
- 6) the lawyer reasonably believes the disclosure is necessary to prevent reasonably certain death or substantial bodily harm;
- 7) the lawyer reasonably believes the disclosure is necessary to secure legal advice about the lawyer's compliance with these rules;
- 8) the lawyer reasonably believes the disclosure is necessary to establish a claim or defense on behalf of the lawyer in an actual or potential controversy between the lawyer and the client, to establish a defense in a civil, criminal, or disciplinary proceeding against the lawyer based upon conduct in which the client was involved, or to respond in any proceeding to allegations by the client concerning the lawyer's representation of the client;
- 9) the lawyer reasonably believes the disclosure is necessary to comply with other law or a court order; or
- 10) the lawyer reasonably believes the disclosure is necessary to inform the Office of Lawyers Professional Responsibility of knowledge of another lawyer's violation of the Rules of Professional Conduct that raises a substantial question as to that lawyer's honesty, trustworthiness, or fitness as a lawyer in other respects. See Rule 8.3.
- 11) the lawyer reasonably believes the disclosure is necessary to detect and resolve conflicts of interest arising from the lawyer's change of employment or from changes in the composition or ownership of a firm, but only if the revealed information would not compromise the attorney-client privilege or otherwise prejudice the client."

Minnesota Rules of Professional Conduct (2016)

Sample Confidentiality Agreement

As part of my participation in the University of St. Thomas School of Law Mentor Externship, I, _____ - _____, hereby enter into this Agreement with _____, and agree as follows:

I shall not, except as authorized by _____, at any time during or after Mentor Externship disclose to any other person or entity any proprietary, confidential, or sensitive information of or pertaining to _____ (collectively called "Confidential Information"), which has come into my possession, custody or knowledge during the course of Mentor Externship; nor shall I use any such Confidential Information for my personal use or advantage or make it available to others. I will not disclose or use, directly or indirectly, any Confidential Information, or make such Confidential Information available to others for use in any way.

Confidential information includes _____

All information, received by me, the student in Mentor Externship, pertaining to _____ or _____'s business is presumed to be confidential until it becomes readily available to the general public lawfully and without breach of confidential obligation.

By my signature below, I hereby acknowledge that I have read this Agreement and agree to its terms.

Name of Mentee (Please Print)

Name of Mentor (Please Print)

Signature

Signature

Date

Date

Avoiding Conflicts of Interest

Obligation to Avoid Conflicts of Interest. Minnesota Supervised Practice Rule 6(3) compels a law student who is employed or who has a paid or unpaid externship or internship with a legal employer to comply with the Minnesota Rules of Professional Conduct, including its conflict-of-interest rules. As such, these law students must be alert to any potential for conflicts between the interests of their employer or externship/internship placement and their activities in Mentor Externship.

Actual or Potential Conflicts of Interest. An actual conflict of interest occurs where the interests of a client are adverse to the interests of the lawyer or a lawyer's other client.²³ While a student as a mentee is not representing a client, their activities or access to confidential information of a mentor's client may create a conflict with the clients of a student's employer or externship/internship placement. For example:

A student who is a Certified Student Attorney for a legal aid agency has a conflict of interest if they research and write a memo for a mentor or is given access to confidential information relating to a client who is adverse to a client of the legal aid agency.

Potential conflicts of interest occur when a student has an employer or externship/internship placement that is at odds with a case the mentor is handling or the mentor's practice area, or with the mentor's role as a judicial officer. Regardless of whether an actual conflict of interest exists, loyalty concerns or the perception of a conflict can be troublesome for the mentor, the employer, or the externship/internship placement. For example:

A student who is a Certified Student Attorney in a county attorney's office has a potential conflict if they are placed with a mentor who represents clients in matters adverse to that county. Since a county attorney's office is a law office, a potential conflict of interest might exist even if the student is not in the division of the county attorney's office to which the mentor is adverse.

A student in an externship/internship/clerkship placement in a county attorney's office or a district public defender in a county has a potential conflict if they are placed with a district court judge from that county as a mentor. This creates the appearance of a conflict, even if the student is not working on criminal cases or civil cases that come before the judge.

A student working or interning at a private law firm or legal aid office has a potential conflict if they are placed with a mentor who represents a client adverse to the firm.

Avoiding and Addressing Potential Conflicts. Avoiding conflicts requires a student to 1) be aware of the potential for conflicts; and 2) communicate with Mentor Externship, the employer or externship/internship placement, and their mentor.

1. Notify Mentor Externship when giving mentor preferences. A student updates their profile in Mentor X Log each year to indicate their mentor preferences. If the identified interest areas are related in subject matter to the work the student does for an employer or other externship/internship placement, the student should identify in the "other placement information" section the student's employer or other externship/internship placement. That way, Mentor Externship can avoid placing the student with a mentor whose practice area or role might present the potential for a conflict of interest.

²³ See generally Minnesota Rules of Professional Conduct 1.7, 1.8, 1.9, 1.10.

2. Communicate with the employer or externship placement. If a student is placed with a mentor whose practice area or role may create a potential conflict, or the appearance of a conflict, the student should contact the employer or externship/internship supervisor. The employer or externship/internship supervisor needs to know about it so they can determine whether the student's assigned mentor may present a conflict of interest or put in place measures to avoid any conflict.
3. Communicate with the mentor. The Personal and Professional Development Plan (PPDP) meeting is a good time to talk about the work the mentor does, and the student's employment, volunteer legal activities, clinic, or previous client activities the student has been involved in with prior mentors. This will allow the mentor to anticipate and discuss with the student any potential conflicts that may arise.

If there is a conflict between the Mentor Externship placement and an employer or other externship/internship placement, please contact a Mentor Externship director right away - ucampbell@stthomas.edu or meghan.feliciano@stthomas.edu

Protecting Confidentiality to Avoid Potential Conflicts. The potential for conflicts of interest is reduced by maintaining confidentiality of client information as required by Rule 1.6. Each student certifies and acknowledges in the PPDP that they have read Rule 1.6 of the Rules of Professional Conduct and will keep information confidential. By making this certification, client confidentiality and attorney-client privilege protections apply, and the mentor can ethically share client information. To keep information in the mentor relationship confidential, a student must never discuss client information or any other confidential information with others and must describe clients generally rather than using client names in Mentor X Log.

FIELDWORK GUIDE

Mentor Externship fieldwork supports the initiation and development of the mentor relationship, provides an opportunity to observe and do the work that lawyers and judges do, and to practice important skills needed in the legal profession in a setting that allows for oversight, thoughtful reflection, and feedback.

Understanding and Using Mentor X Log

Purpose of Logging Fieldwork

Students record their fieldwork activities as they occur using Mentor X Log, which simulates time management and billing software used in the legal profession (Mentor X Log allows time to be recorded in 15-minute (0.25 hour) increments). By allowing students to record their fieldwork, Mentor X Log also:

- Ensures that ABA accreditation standards are met by effective oversight of program requirements
- Helps students develop the time tracking skills expected in the profession
- Allows students to visualize billing as a communication tool
- Teaches students the art of accurately describing their law-related activities
- Allows students to reflect on what they are learning from their experiences
- Provides an opportunity for faculty feedback and guidance to students on their journey to the profession

Tracking time immediately following the fieldwork will ensure that the entry meets the accuracy standards required in the program and the profession, and ensures that students receive credit for their time investment in the program. ***Entries must be submitted in a timely manner; events not logged within 90 days may not be approved for credit.***

Deadlines

Mentor X Log tracks significant deadlines in the fieldwork, including initial points of contact; the initial PPDP Meeting with the mentor; the mentor debriefs, experiences, and total minimum fieldwork required during the year; and the Year-End Meeting with the mentor. Approaching deadlines are coded in colors:

White status:	Indicates a future deadline that students should note and manage their time to meet the deadline
Yellow status:	Indicates a deadline approaching in two weeks
Green status:	Indicates the student has satisfactorily completed the deadline
Red status:	Indicates a missed deadline and further action is required by the student to maintain good standing, unless an extension has been granted. (See <i>“Extensions and Other Communication Guidelines”</i>).

Note: after a deadline, Mentor X Log will turn the deadline red until the corresponding entries have been approved. Because the directors review each entry, and hundreds of entries are often submitted near deadlines, this can take days or weeks. Mentor X Log date stamps all entries and, once approved, all timely entries will turn green on the timeline. Late submissions will remain red on the timeline, even after approval; for deadlines (rather than goals), students are encouraged to contact the directors to acknowledge late entries, even if requirements have subsequently been met.

Approval and Feedback

Mentor Externship Directors review all logged entries and provide feedback. Second- and third-year J.D. students additionally receive feedback on their entries from their faculty mentors.

Approval Standards

Mentor X Log ensures that entries meet minimum requirements by requiring dates²⁴, minimum word counts, and identification of mentors and other identified lawyers and judges involved in activities. (For a description of the events and their specific requirements see *“Fieldwork Terms and Descriptions”* tab).

Each student entry is reviewed by the directors to ensure compliance with ABA standards and the standards and objectives of the program, and are coded in the following way:

- **Approved** – The entry is accurately categorized, adequately describes the event, and is properly reflective.
- **Returned** – The entry as submitted needs revision before it can be approved. Common reasons include: 1) the event is not accurately categorized (See the *“Fieldwork Terms and Descriptions”* tab) or insufficient information has been provided to make the determination; 2) the event is not described in sufficient detail for a reader to understand what occurred; 3) the description does not adequately reflect what was learned or taken away from the event; or 4) it does not meet the minimum professional standards for submission (complete sentences, proofread). Students receive suggestions on how to revise returned entries for approval. While Mentor X Log includes a messaging function, to submit a message within the software, students must click “Edit” and then resubmit the log entry, so Mentor X Log sends the log entry with the added message back to the directors for review – students will see a **purple hourglass** once the log entry has been returned to the directors.
- **Rejected** (rarely occurs) – The entry as submitted will not, under any circumstances, be approved because it is one of the experiences that have been identified as not appropriate for credit, has not been submitted in a timely manner, or is not consistent with the primary objectives of the program. (See the *“Disallowed Activities”* tab). The reviewer will indicate in the comments why it has been rejected. Note: sometimes an entry is rejected in the submitted form, but a director will provide instructions for submitting in a different, acceptable form. For example, if a student submits a happy hour with new lawyers as an Experience, a director may reject the Experience entry but instruct the student to resubmit the activity as a Networking entry (only networking along with a student’s mentor counts as an Experience, but a limited number of independent networking hours may count towards a student’s overall fieldwork hours).

The status of a log entry is reflected in the student’s Fieldwork screen in Mentor X Log. Students should regularly check their entries in Mentor X Log to see whether they have been approved, make any necessary corrections, review any feedback, and monitor their progress. Students are responsible for reviewing their entries and addressing any deficiencies in a timely and professional manner.

²⁴ Fieldwork is completed and logged during the academic year between the commencement of fall semester and the designated due date to log the Year-end Meeting in April/May in compliance with ABA standards.

MegaMentorGPT

MegaMentorGPT is your virtual guide to Mentor Externship. Grounded in the pedagogy, structure, and professional formation goals of this three-year, required externship program, MegaMentor can answer questions, offer tips, and help mentors and mentees make the most of this mentorship opportunity.

Fieldwork Types and Descriptions

The types of Mentor Externship fieldwork in Mentor X Log include:

- Orientation
- Points of Contact
- Personal and Professional Development Plan (PPDP) Meeting (the PPDP document is submitted separately)
- Experience
- Debrief
- Networking

AFTER all fieldwork is logged and approved, the mentor and student complete – and the student logs – a Year-End Meeting.

Identifying a Mentor or Other Lawyer or Judge who is “Present.”

Mentor Externship fieldwork focuses on in-person relationship building between mentor and student but provides mentors and students with flexibility to maximize opportunities for relationship building and learning.

- “Present” for purposes of core meetings between the student and mentor (Personal and Professional Development Plan Meeting, Debriefs, and the Year-End Meeting) means the mentor and student met face-to-face which includes in-person meetings **and** meeting via video conferencing. Meetings in other formats require prior director approval.
- “Present” for purposes of experiences with the mentor means in person or by video conference, telephone, or email, as the student and the mentor decide.
- “Present” for purposes of experiences with other attorneys or judges means in person or by livestreaming, video conference, or phone conference (i.e. in real time).

Networking conversations with other attorneys or judges may be in person, or by video conference, telephone, or email.

Orientation

This fieldwork category is used to log attendance at the required orientation at the beginning of 1L year. Students log the date, the amount of time (up to two hours) spent in orientation (both online and in person), and provide a brief description.

Points of Contact

This fieldwork category is used to log brief contacts such as emails, text messages, telephone conversations, or thank you notes to the mentor or the mentor's staff.²⁵ to stay in touch or to schedule events. These contacts are typically brief and logistical in nature, and are critical to maintaining the relationship with the mentor. It is important to record them to receive credit for the time and to show the student's regular contact with their mentor throughout the year.

Students may log up to 0.25 hours per contact and should use their own judgment to determine how much time, if any, to log for very brief contacts, just as they would when billing a client. For example, a student can log a very brief email in one log entry as 0 minutes. Or they could log a series of four very brief emails in one log entry for a total of 0.5 hours. If a student and mentor exchange a string of messages, even over multiple days, these contacts may be logged in one Point of Contact entry, and the description can explain the back-and-forth.

In Point of Contact entries, students should summarize their communication with their mentor, not copy and paste the text of the exchange. For example, a student could say "My mentor and I exchanged four emails over two days, to schedule our upcoming Experience and Debrief."

Personal and Professional Development Plan (PPDP) Meeting

This fieldwork category is used to log the time spent by a student: 1) preparing to meet their mentor for the first time and preparing the draft PPDP form to reflect the experiences and debriefings they would like to have this year; 2) traveling to and from the meeting; and 3) the meeting itself. Students must follow the *PPDP Process* outlined in the *Personal and Professional Development Plan Guidance* section of this manual to prepare the draft PPDP, meet with their mentor, and log the PPDP Meeting.

Experiences

This fieldwork category is used to log each opportunity in which the student observes or engages in the professional work or activities of lawyers and judges. Students receive credit for the following types of experiences:

Identified Experiences – These pre-approved experiences are common events in the legal community (e.g. bar association meetings and continuing legal education programs) and in specific legal or practice areas that correspond with the law school curriculum (e.g. various types of trial preparation and legal proceedings). Students commonly engage in these experiences with their mentors, but they may also engage in them in the presence of other lawyers or judges who are not University of St. Thomas faculty or staff. First year students are encouraged to focus on experiences that augment the required curriculum and that introduce them to the practice of law, the administration of justice, and the life of the lawyer or judge. (An index with internal links to the more than 500 identified experiences is available in the "**Identified Experiences**" section. When an experience involves *observing* an activity, students are required to share their reflections and questions with an attorney or judge (mentor or other) after the activity, either through conversation or in writing. Students must confirm this element in their log entry.

Wild Card Experiences – These are distinct lawyering tasks or activities that a **mentor** wishes to expose their student to, which are not identified experiences. This allows the mentor to suggest experiences, and the student and mentor to identify experiences that help further the student's skill or professional development. Students engage in these activities in the presence of or under the supervision of their mentors. When logging, students

²⁵ Brief contacts with other lawyers or judges as part of a networking experience are logged in the "networking" category.

should include a title for the Wild Card Experience, so the software will recognize each Wild Card Experiences as a distinct experience type.

Director-Approved Experiences – These are experiences which are not identified experiences and not undertaken with a student’s mentor (i.e. not a Wild Card Experience), but are supervised by a different attorney or judge and meet the standards of the program, and for which students have requested and received **advance** approval from the director. These experiences allow a student to pursue their own professional development path. In addition, the director may from time to time approve and announce via Canvas announcement Director-Approved experiences that do not fit into the other categories but meet program objectives.

Minimum Logging Requirements. The Experience entry is logged using complete sentences and carefully proofread. In addition, it must 1) identify whether the mentor or another lawyer or judge was present; 2) describe the experience in sufficient detail; and 3) reflect the value of the experience, which requires consideration of how the experience has advanced the student’s understanding of the profession, contributed to their professional goals, developed professional competencies/skills, or shaped professional identity. Director-Approved Experiences must identify when and how director approval was received.

Experiences with Lawyers or Judges Other than the Mentor. Students may engage in experiences (other than “wild card” or identified experiences expressly requiring mentor presence) with another lawyer or judge. The lawyer or judge may not be University of St. Thomas faculty or staff unless approved by the director.

Observation Experiences. If an Experience involves observing a particular setting or procedure, students must email their reflections or discuss their observations and questions about the experience with their mentor or another attorney or judge. In their log entry, students should list the person they emailed or discussed the experience with as the named attorney or judge and include a sentence about their communication with them.

Note: If a student discusses the Experience with their mentor face to face (in person or via video conference), they may log the discussion portion in a separate Debrief log entry.

Finding the Correct Experiences. Students can search by terms in Mentor X Log for experiences and experiences topics or types. Students may also consult the experiences list (See **“Identified Experiences”**) to assist them in properly identifying their experiences.

Determining Whether an Experience is “Distinct.” Students complete a minimum number of “distinct” experience **types** each year. This ensures that students are exposed to and experience a variety of different procedures or processes. 1L students must complete at least four distinct experience types and 2L/3L students must complete at least five distinct experience types each year.

Repeated experiences of the same experience type in different years are distinct. For example, if a student observed the deposition of a fact witness as a 1L and then watched another deposition of a fact witness as a 2L, the student’s log entry of the deposition of the fact witness during their 2L year will count towards their distinct-experience-type requirement for their 2L year.

Repeated experiences of the same experience type in the same year are **not** distinct. A difference in the facts or parties does not make the experience distinct.

For example, a deposition of an expert witness is distinct from the deposition of a fact witness in the same case, while a deposition of a fact witness in a case is not distinct from deposition of another fact witness in either the same or a different

case. Similarly, a mediation of a dispute over a contract provision is distinct from a mediation in a family law matter, but it is not different from a mediation in another contract dispute, even though the terms of the contract or parties are different.

Students with more than one event of the same experience type who wish to attempt to distinguish the events should contact a director and describe the events in sufficient detail to show how the events are distinct from one another.

Mentor X Log is unable to distinguish between events that have the same event type so the student's Mentor X Log counter will not reflect the second and subsequent events of the same event type as "distinct." Mentor Externship Directors are happy to answer questions about whether certain events can be treated as distinct or not.

Debriefs

This fieldwork category is used to record face-to-face conversations with the mentor.²⁶ A Debrief is either: 1) a discussion after having an experience with a mentor; 2) a meeting with the mentor to discuss an experience the student had without the mentor, law school experiences, or other topics of conversation that are in the nature of a mentoring relationship; or 3) a discussion of one of the prepared templates. (An index and templates for debriefing are available at the "[Debriefing Templates](#)" tab).

The Debrief log entry must be a minimum of 100 words, is written in complete sentences, proofread, and: 1) describes the conversation or sets forth the responses to the template questions; and 2) reflects on the value of the conversation, which requires consideration of how the debriefing has advanced understanding of the profession, contributed to professional goals, developed professional competencies, or shaped professional identity.

Students must complete at least two Debriefs with their mentor each year.

Networking

This fieldwork category is used to record conversations with lawyers or judges other than the student's assigned mentor and who are not St. Thomas faculty or staff.

Please note:

- Networking does not constitute an Experience.
- Listening to a panel or speaker does not constitute Networking (though students may network with lawyers or judges before or after a presentation).
- Students may include in their Networking log entry the reasonable time they spent preparing for the conversation (any prep time must be described in the log entry description). However, travel time is not included.
- A limited number of networking hours, including networking prep time, count toward the overall minimum fieldwork hour requirements. Mentor X Log will count up to three hours per academic year for 1L and LLM students and up to five hours per academic year for 2L and 3L students; students may log more networking conversations, but **the software will automatically stop counting** the time after students reach the corresponding cap.

The networking entry must be written in complete sentences and: 1) identify the networking event or activity; and 2) indicate how the networking event or interaction with lawyers and judges connected the student to new information or

²⁶ Conversations with lawyers or judges other than the mentor are not "debriefs." These conversations with other lawyers or judges can be 1) logged in the "networking" category; or 2) logged along with an experience attended with that lawyer or judge. If the student wishes to complete an experience with a lawyer or judge who is not the student's mentor that is not on the experience list, he or she must seek advance "Director approval" to ensure credit.

new opportunities to expand legal contacts, broadened understanding of the profession, provided an opportunity to show skills and commitment to the profession, or provided an opportunity to evaluate a practice area or work environment.

Year-End Meeting

This is NOT a fieldwork category, but a distinct type of entry, logged AFTER the completion of a student's fieldwork.. Once a student has completed and received approval for the minimum required fieldwork, they print (or print to PDF) the compilation of their approved log entries, and bring it to a face-to-face meeting with the mentor to discuss it. After the meeting, the student logs the meeting, describing the meeting and **making the necessary certifications** to complete the Year-End Meeting deadline. (See "**Standards of Conduct**" section.) No time is logged for this meeting since it occurs after all fieldwork requirements have been logged and approved. However, this is a **core meeting**, and must be logged for successful completion of Mentor Externship. If a student encounters difficulties regarding this meeting, they should reach out to a director as soon as possible.

***Note:** * If a student's minimum fieldwork requirement will not be complete at the time of the Year-End Meeting, the student should contact a director prior to the meeting to determine how to address the deficiency.

MENTOR EXTERNSHIP COURSEWORK DESCRIPTION

Second-Year Course: Mentor Externship I (Laws 930) Class Topics and Activities

The second year of Mentor Externship builds on the first year's primary focus on the mentor relationship and introduction to the profession. Students are encouraged to develop a self-directed course of professional development, build a constellation of mentors and professional contacts, engage in self-assessment, and identify skills and competencies essential for success in the profession. The small group discussions and assignment focus on the following topics.

Setting Your Own Course to the Profession focuses on how a student can set the course of their own professional journey through Mentor Externship and identify what they need to do to prepare for the legal profession. Class prep and discussion should help students:

1. Understand what professional preparation and whole-person formation mean
2. Draft a personal ethics mission and goals for your Personal and Professional Development Plan (PPDP) (be sure to consider the top competencies required in the legal profession)
3. Identify a plan on how you will achieve your goals

Building Your Professional Network helps students take steps towards achieving the goals they identified in Class 1 by building a professional network that will help them now and throughout their professional life to learn, grow, and serve others well. Class prep and discussion should help students:

1. Identify contacts who can help you achieve your identified goals.
2. Begin to build your professional network.

Understanding Factors that Shape Our Relationships focuses on preparing students for effective relationship-building and interactions within their professional network and the diverse constituencies whom they will serve. Class prep and discussion should help students:

1. Explore foundational emotional intelligence and relationship skills of self-awareness and empathy
2. Examine how subconscious cues influence perceptions and decision-making
3. Reflect on how diverse backgrounds and perspectives enrich interactions and enhance mutual understanding in their professional relationships

Identifying Expectations of the Profession explores the diverse and varied competencies that provide the platform for success in different employment situations.

The student turns to a member of the profession for insight and guidance on how to identify and develop core professional competencies. The student then writes an essay that explores the identified competencies and reflects on where they stand against the identified competencies. The student evaluates how they will use Mentor Externship experiences and debriefings to create the opportunity to fine-tune and further evaluate the core competencies necessary to transition to professional employment and to be a success in their first five years. The faculty mentor will review the essay and provide feedback.

Your Well-Being as a Legal Professional looks at well-being as a part of students' professional identity and focuses on the competency of time management to achieve that well-being. Class prep and discussion will explore what students can do to

develop the well-being practices they need, to be the healthy lawyer they want to be during the remainder of the school year, over the summer, and as a career-long commitment.

During the year, the Faculty Mentor reviews all of the student's submissions, including Mentor X Log entries and the PPDP, and meets with the student to discuss how the student is progressing on their networking plan and professional journey.

The student writes a final reflection, looking back on their activities during the year (mentor development, networking, fieldwork, skill development, observations, and conversations), and the student identifies the next steps in their self-directed professional journey.

The faculty mentor and student then meet to assess the student's progress and discuss how the student can position themselves to maintain productive professional activities over the summer and provide feedback to the student for optimal growth.

Third-Year Course: Mentor Externship II (Law 933) Class Topics and Activities

The third year of Mentor Externship focuses on the last part of the student's professional journey as a law student to successfully transition to the profession.

Setting Your Own Course as a Professional focuses on preparing students for their transition from law student to lawyer, and help them:

1. Identify goals or tasks they have ahead of them such as the bar application, job hunt, and the bar exam
2. Revisit the time management strategies from 2L year to tackle the tasks they identified
3. Take a step forward in tackling these tasks

In addition, the student sets their own course by writing an introductory letter to their mentor, attaching a current resume, describing how and what they learned in 2L Mentor Externship, and what they hope to learn in the coming year. The faculty mentor provides feedback on both.

Marketing Your Professional Identity helps students to succinctly answer the questions they are often asked: What would you like to do with your law degree? What kind of lawyer do you want to be? This class helps students to craft and practice an "elevator speech" – their answer to these questions in a way that shares their professional identity and markets their credentials.

Advanced Perspectives in Communicating with Those You Will Serve builds on the foundational skills of self-awareness and empathy, and the value of diverse perspectives that students explored in 2L Mentor Externship class. In students' 3L year, the focus shifts to looking at how diverse perspectives affect understanding and how we can practice communication techniques that recognize, integrate, and respect these diverse viewpoints to further communication.

Managing Expectations in the Profession focuses on helping students develop a framework for managing expectations with colleagues and clients and practicing the top competencies mentors identified as necessary for success in the legal profession: communication skills, client service, time management, adaptability, and teamwork.

Living Your Professional Identity focuses on the student's well-being as they prepare to set off on their course as a professional.

During the year, the faculty mentor will review all of the student's submissions, including Mentor X Log entries and PPDP, and will meet with the student to discuss how the student is progressing on their networking plan and professional journey.

The student writes a final reflection, looking back on their experiences in Mentor Externship (mentor development, networking, fieldwork, skill development, observations, and conversations) and identifying the next steps in their self-directed professional journey.

The faculty mentor and student meet to discuss the student's skill development and management of their mentor and other professional relationships. The faculty mentor will provide feedback, guidance, and support to the student in their transition from legal education to professional employment.

2025-26 FACULTY MENTORS

Barner, Jabari

Hennepin County Attorney's Office

Browne, Hon. Michael

Hennepin County District Court

Dahlquist, Sally

University of St Thomas School of Law

Drotning Hartwell, Elizabeth

Henson Efron

Foster, Maureen

Spencer Fane LLP

Hamilton, Neil

University of St Thomas School of Law

Johnson, Sam

Skolnick & Bardwell, P.A.

Kaster, Lucas

Nichols Kaster, PLLP

Kettwick, Treye

Ramsey County Attorney's Office

Konezny, Jerryn

Co-Founder of The Glinda Factor

Lima, Anna

Lima Law Office, PLLC

Monroe, Dennis

Monroe Moxness Berg

O'Leary Sullivan, Jana

League of Minnesota Cities

Reed, Hon. Franklin

Hennepin County Family Court

Song, Grace

MN Department of Human Services

Botts, Christy

Diamond Lake Clinic & Lake Line Realty

Campbell, Uyen

University of St Thomas School of Law

Dailo Jison, Nicole

Life Time, Inc.

Feliciano, Meghan

University of St Thomas School of Law

Gould, Monica

University of St Thomas School of Law

Hoversten, Andrea

Geraghty, O'Loughlin & Kenney, P.A.

Jison, Chris

Wells Fargo Bank

Kettwick, Nicole

Brandt Kettwick Defense

Kooda, Tove

Hennepin County District Court

Linstroth, Nicholas

Hennepin County Attorney's Office

Mitchell, Dana

Minnesota Attorney General's Office

Newborn, Toni

St. Paul Mayor's Office

Organ, Jerry

University of St Thomas School of Law

Rorvig, Andy

McEllistrem, Fargione, Rorvig & Moe, P.A.

Stoneking, Shannon

Ramsey County Law Library

Thuente, Carey
Guyton Thuente PA

Vaughn, Juliana Cadavid
Hennepin County Adult Representation Services

Wheaton, Chris
LivaNova PLC

Tolzmann, Elizabeth
City of Bloomington

Vaughn, Manire
Minnesota Housing Finance Agency

MENTOR EXTERNSHIP STAFF CONTACTS

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PERSONAL AND PROFESSIONAL DEVELOPMENT PLAN (PPDP) GUIDANCE

Your Personal and Professional Development Plan (PPDP) is a written plan that you create in Mentor X Log of what you want to learn during the year with your mentor and other attorneys or judges. As opportunities arise during the year, you can **absolutely deviate** from your PPDP. Your PPDP should not limit what you and your mentor can do. Your PPDP should simply act as a starting point for activities that you would like to do.

You will complete the PPDP form in Mentor X Log by following the PPDP process outlined below. Beforehand, you will need to prepare by drafting a mission statement, identifying experiences you would like to do from the list of identified experiences, topics you would like to discuss, and skills you would like to develop.

PPDP Process

1. Draft your PPDP in Mentor X Log by selecting **Plan (PPDP)** from the purple sidebar and then clicking on Get Started. Please note that the PPDP must be drafted using the form in Mentor X Log. Other forms or formats such as Microsoft Word or Google Docs are not allowed.
2. Carefully review the certifications. If you are able to make the required certifications, click the certification boxes.
3. Once you have **drafted** your PPDP, save your draft PPDP and click on “Print” to print a copy of your PPDP or save a PDF copy of your PPDP (do not submit your draft).
4. Email the draft PPDP to your mentor before your initial meeting with your mentor or bring the printout of the draft PPDP to your meeting with your mentor.
5. At the meeting, review and discuss the draft PPDP with your mentor.
6. After the meeting, click on Plan (PPDP) again to revise your PPDP to reflect any changes discussed with your mentor. Then **submit** your Plan (PPDP) (once submitted, you are unable to edit your PPDP).
7. Next, select **Fieldwork** from the purple sidebar and click on Add New Entry.
8. Under Activities with Your Mentor, select PPDP Meeting. Provide details of your PPDP Meeting as prompted. Enter the meeting and travel time and carefully review the certification that you have met face to face (in person or via video conference) and reviewed and discussed your PPDP with your mentor.

If you are able to make the required certification, click the certification box and submit your PPDP Meeting log entry. Note: students must submit a finalized PPDP document **and** a PPDP Meeting log entry.

Drafting Your Mission Statement

Mentor Externship asks you to incorporate your core values into your growing professional identity. The program also asks you to evaluate and examine the profession's ethical and social values. "[F]or students to incorporate the profession's ethical-social values into their own, they need to encounter appealing representations of professional ideals, connect in a powerful way with engaging models of ethical commitment within the profession, and reflect on their emerging professional identity in relation to those ideals and models."²⁷

While the mentor-student relationship and fieldwork provide the framework for this professional growth, this is ultimately your personal, self-directed journey. This journey begins with reflection on your first principles, core values, and overarching goals in the form of a mission statement.

The mission statement serves as a fulcrum on which to balance what you are seeing and doing in the program. As you learn more about yourself, the profession, and your role within it, you can refine or modify your personal mission.

Consider the following questions as you draft your personal mission statement:

1. What is your purpose and why did you come to law school?
2. How are you living your purpose? (Your current nature, habits, involvements, and activities that make you who you are)
3. What principles or beliefs guide you on a day-to-day basis? (Your core values or principles)
4. What is your responsibility for the development of your moral character?
5. How will you take responsibility for meeting your professional ethical responsibilities?

Your personal mission statement should²⁸:

- Express your professional identity and purpose in a way that personally inspires or motivates you to continue working toward your goals
Articulate your mission in a way that makes sense to you
Describe what you are currently doing using active verbs
- Be short and concise

Example 1:

"I am an optimist and enjoy everything life offers me. I have the ability to choose to be happy. I want to be known for my positive words and actions toward others. Every aspect of my life prior to law school will remain a factor of who I am and

²⁷ William M. Sullivan et al, EDUCATING LAWYERS: PREPARATION FOR THE PRACTICE OF LAW (2007) at 135 (the Carnegie Foundation's 2007 study of legal education). See also Neil W. Hamilton, "Assessing Professionalism: Measuring Progress in the Formation of an Ethical Professional Identity" 5 University of St. Thomas Law Journal (2008) University of St. Thomas Legal Studies Research Paper No. 08-10.

²⁸ The organization that follows was inspired by Janel M Radtke's work on writing business mission statements.
<https://www.tgci.com/sites/default/files/pdf/How%20to%20Write%20a%20Mission%20Statement.pdf>.

who I will become. I will remain active in my family, friends, church, faith, running, dancing, and passion for doing good for others in the community. Those I interact with will see me as a fair, honest, responsible, hardworking, caring, and compassionate individual. With no regrets, my morals and values will guide me in carrying out my thoughts and actions every day.”

Purpose: “I want to be known for my positive words and actions toward others.”

Current Involvement/Activities: “I will remain active in my family, friends, church, faith, running, dancing, and passion for doing good for others in the community.”

Beliefs: With no regrets, my morals and values will guide me in carrying out my thoughts and actions every day.

Example 2:

“I am committed to the preservation and further understanding of the human dignity of every person through the legal profession. I will give special care to protect each person's conscience, the means by which God first speaks to the individual. I am committed to pursuing justice and maintaining harmony in society, and I am committed to aiding the most vulnerable in society, especially those who cannot advocate on their own behalf.”

“I pledge to be a respectful and responsible professional in all interactions with my mentor. To be on time, prepared, and receptive to learning all that I can from my mentor. By reviewing cases, preparing my own arguments, and discussing the standards applied by my mentor in deciding cases, I can learn how the law interacts with and respects the dignity of each individual.”

Purpose: “I am committed to pursuing justice and maintaining harmony in society; to aiding the most vulnerable in society especially those who cannot advocate on their own behalf; and preserving and further understanding the human dignity of every person and the whole person.”

Beliefs: “The human dignity of every person and the whole person and protection of each person's conscience, the means by which God first speaks to the individual.”

Responsibility: “To be on time, prepared, and receptive to learning all that I can from my mentor. To be a respectful and responsible professional in all interactions with my mentor.”

Current Involvement: “By reviewing cases, preparing my own arguments, and discussing the standards applied by my mentor in deciding cases, I can learn how the law interacts with and respects the dignity of each individual.”

Identifying Experiences

Research your mentor to determine the mentor’s area of the law and the work the mentor does. Then use the experience list to identify several experiences in those areas that you would like to do with your mentor. In addition, identify a few additional experiences on the list that you are interested in doing this year. (An index with internal links to the more than 500 identified experiences is available in the [“Experiences List”](#) section)

Identifying Debrief Topics

The PPDP meeting will be an opportunity to get to know each other, discuss your plan, and talk about various topics. Your future conversations will give you a chance to learn all you can from your mentor. Identify at least two topics to discuss (debrief) with your mentor during the year. These could be talking about a particular experience, another professional topic of interest, or one of the templates we have created. (An index and templates for debriefing are available in the *"Debriefing Templates"* section).

Identifying Other Learning Objectives

Your mentor relationship allows you to develop and demonstrate essential skills and competencies you will need as a lawyer. Think about what skills or competencies you would like to develop, enhance, or get feedback on from your mentor. These can go in the note section of the PPDP.

Sample PPDP

Personal Ethics Mission

Student identifies first principles, values and goals.

"I am here to learn how to make an impactful and consistent difference in the lives of others. I want to be profoundly competent, ethical, and fervent in ensuring the progression of human dignity and unalienable rights of all. In order to build a reputation that warrants the complete confidence and trust of my clients and the respect of my opponents, I will devote myself now to learning the procedures, principles, and framework of our legal system. To this end, I must consistently be a reputable and responsible student and mentee, always prepared and receptive to learning. My morals and values will guide me in carrying out my thoughts and actions every day."

Debriefing Topics

Student and mentor identify a minimum of two (2) issues or topics to discuss during the year. Student and mentor can discuss: an experience, a template (see list of Templates for suggestions), or other agreed-upon professional topic.

"I would like to discuss immigration and children - specifically children arriving to the US with no adults. The organization my mentor works for has a department focusing on providing this assistance. I would like to view a trial in which a minor is represented and discuss it with my mentor afterward."

"A more general topic for us to discuss would be the toll that nonprofit work takes on a home life experience. Finding work balance is something that has been expressed to us several times already in our short three weeks on campus, and I hope to be able to investigate this and learn of other's experiences, specifically my mentor's, in order to truly grasp the concept of handling both a personal and professional life."

"I would also like to discuss the "Grades and the Profession" template with my mentor."

Additional Notes or Comments

This is a blank text box for students to add additional comments or notes regarding the PPDP or meeting.

“I would like to receive feedback on my writing from my mentor and learn all I can about the expectations of the profession”

Experiences

Select experiences that you’re interested in completing. Student and mentor identify a minimum of two (2) experiences to complete together.

- Attend a Deferred Action for Childhood Arrivals (DACA) hearing
- Attend a bar association meeting
- Attend a deportation hearing or trial
- Attend a naturalization ceremony
- Attend a potential or existing client meeting* (e.g., interview, fact gathering, or file review)
- Attend an Immigration Court Individual Hearing
- Draft or review written advice to a client

APPENDIX A: EXPERIENCES TYPES

Mentor Externship experiences are discrete events that allow students to observe or engage in the professional work and activities of lawyers and judges. Students receive credit for the following types of experiences:

Identified Experiences

The list of identified experiences below is organized by practice area or subject matter and is searchable.

Wild Card Experience

Engage in any experience with or under the supervision of your mentor that is not one of the identified experiences.

Director-Approved Experience

Engage in any experience with or under the supervision of a lawyer or judge who is not your mentor for which you have received approval in advance from the director.

Identified Experiences Corresponding to the Law Curriculum and Associated Legal or Practice Areas

[Administrative Law](#) (social security, human services, licensing)
[Alternative Dispute Resolution/Arbitration/Mediation](#)
[Antitrust](#) (trade regulation)
[Banking Law](#)
[Bankruptcy](#)
[Business Associations/Ethical Leadership in Corporate Practice/Corporate Governance/Non-Profits](#) (business, corporate, non-profit, in-house) (business, corporate, non-profit, in-house)
[Canon Law](#)
[Child Protection](#)
[Civil Procedure/Electronic Discovery/Complex Litigation/Federal Jurisdiction](#) (litigation)
[Civil Rights/Community Justice/Commutations/Disability Law/Human Rights/Public Interest](#)
[Client Interviewing and Counseling](#)
[Common Professional Experiences](#)
[Compliance/Organizational Ethics and Compliance/Ethical Culture/Risk Management](#)
[Contracts/UCC/Sales](#) (contract, franchise, sports, entertainment, art, business & commercial transactions)
[Credit and Payment Devices/Payment Systems/Consumer Law](#) (collection, debtor rights, creditor rights)
[Criminal Law/Criminal Procedure/White Collar Crime/Misdemeanor](#)
[Defense/Federal Commutations/Sentencing](#) (prosecution, defense, law enforcement)
[Education Law](#)
[Elder Law](#)
[Employment Law/Employment Discrimination](#)
[Energy Law](#) (public utilities, regulated industries)
[Environmental Law](#)
[Estates and Trusts/Estate Planning/Federal Estate & Gift Tax](#) (probate, guardianship, conservatorship)
[Family Law/Adoption/Domestic Abuse](#)
[Federal Income Taxation, State & Local Tax, Taxation of Business Enterprises](#)
[Finance and Securities/Broker Dealer Regulation/Corporate Finance/International Finance](#) (financial services)
[Health Law](#)
[Immigration](#)
[Insurance Law](#) (commercial litigation, business transactions)
[Intellectual Property – Copyright/Trademark](#)
[Intellectual Property – Patent](#)
[International Law](#)
[Jurisprudence and the Work of a Judge](#) (judges, court personnel)
[Juvenile Law](#)
[Labor Law](#)
[Law Firm Practice/Small Firm Practice/Accounting for Lawyers/ Business Planning](#)
[Lawyering Skills/Advanced Legal Research](#) (appellate, motion practice)
[Legislation](#) (lobbying, legislative)
[Mergers & Acquisitions](#)
[Military Law](#) (JAG, veteran rights)
[Native American Law](#)

Negotiations

Poverty Law (pro bono, pro se, legal aid, public interest)

Professional Responsibility (discipline, attorney malpractice)

Property/Real Estate Development/Land Use (real estate, housing, zoning, planning & land use)

Securities Regulation

State and Local Government (commitments, municipal law, government contracts)

Torts (personal injury, medical malpractice, products liability)

Trial Advocacy/ Evidence (litigation)

Workers' Compensation

Wild Card Experiences

Director-Approved Experiences

Administrative Law (social security, human services, licensing)

- Attend a contested case before an administrative law judge
- Attend a formal adjudication before an administrative law judge
- Attend a meeting regarding a proposed rule change
- Attend a rulemaking hearing before an administrative law judge
- Attend a settlement conference before an administrative law judge
- Attend an administrative hearing before a commissioner's representative
- Draft or review a proposed rule change
- Research a proposed rule

Alternative Dispute Resolution / Arbitration / Mediation

- Attend a mediation
- Attend an arbitration
- Draft or review a confidential memo or letter to a mediator in preparation for a mediation
- Review or compile documents for a mediation
- Review or compile evidentiary documents for an arbitration
- Review or compile non-evidentiary materials for arbitration

Antitrust Law (trade regulation)

- Attend an antitrust training of a group of employees
- Review a complaint alleging a Sherman Act violation
- Review a proposed merger for antitrust issues
- Review a NCRPA notification
- Review an issue involving an antitrust law such as price fixing or discrimination
- Review antitrust compliance program documentation

Banking Law

- Attend a tour of the Federal Reserve
- Draft or review a credit agreement
- Draft or review a credit summary
- Draft or review an opinion or pre-authorization from the Federal Reserve
- Review the Community Reinvestment Act and its impact on financial compliance
- Review the consumer protection process of the FDIC
- Review the risk examination process of the FDIC

Bankruptcy

- Attend a Chapter 11 plan confirmation
- Attend a Chapter 13 plan hearing
- Attend a first meeting of creditors
- Attend a meeting between a debtor and a trustee
- Attend a motion for relief from an automatic stay
- Attend a valuation hearing in Chapter 13 proceedings
- Draft or amend a petition to schedule a bench hearing

Business Associations/Ethical Leadership in Corporate Practice/Corporate Governance/Non-Profits (business, corporate, non-profit, in-house)

Assist in or strategize concerning the work of an internal audit or ethics investigation
Attend a corporate board meeting
Attend a corporate strategy meeting
Attend a corporate "Town Hall"
Attend a meeting between corporate counsel
Attend a meeting of a community foundation
Attend a partnership meeting
Attend a shareholder dispute hearing
Attend a shareholder meeting
Draft or review a consulting agreement
Draft or review a corporate benefit plan
Draft or review a corporate employee handbook
Draft or review a grant application for a non-profit organization
Draft or review a written action for a board resolution
Draft or review an acquisition agreement
Draft or review business formation documents for a new business entity
Draft or review corporate ethics training materials
Draft or review transactional documents related to the work of a transactional lawyer (buy-sell agreements, securities offerings, sponsorship agreement, proxy solicitation, joint venture agreement, etc.)
Participate in an enterprise risk management assignment such as risk ranking and assessment, evaluating risk mitigation plans, etc.
Review a business code of ethics or code of conduct of a corporation
Review a compliance report submitted to a government agency
Review a corporate channel partner or distribution agreement
Review a corporate supply agreement being negotiated
Review a corporation's product warranties
Review corporate marketing literature
Review license or intellectual patent development agreements or patent assessments
Research material in connection with a grant application for a non-profit organization
Review or conduct an insurance policy audit
Review regulatory compliance issues, strategies or practices

Canon Law

Attend a meeting involving formulating grounds for annulment
Attend a tribunal hearing in the annulment process
Attend an initial meeting in the annulment process
Review a decision by a canonical tribunal

Child Protection

Attend a child in need of protection or services (CHIPS) trial
Attend a child protection admit-deny or pretrial hearing
Attend a child protection hearing involving the Indian Child Welfare Act (ICWA)
Attend a permanency progress review hearing (PPR) hearing
Attend a meeting with a guardian *ad litem*

Attend a permanency trial (termination of parental rights or transfer of custody)
Attend a post-permanency review hearing
Attend an emergency protective care hearing
Attend an evidentiary hearing in a child protection matter
Attend an intermediate dispositional review hearing
Review a child in need of protection or services (CHIPS) petition
Review a child protection case plan
Review a permanency petition

Civil Procedure/Electronic Discovery/Complex Litigation/Federal Jurisdiction

Attend a conciliation or small claims court matter
Attend a court supervised settlement conference
Attend a deposition
Attend a discovery motion (e.g., motion to compel production of documents; motion to compel answer to interrogatories)
Attend a hearing seeking a temporary restraining order or injunction
Attend a hearing for default judgment
Attend a motion for J.N.O.V. or new trial
Attend a motion for summary judgment
Attend a motion to dismiss
Attend a motion to vacate a default judgment
Attend a non-dispositive civil motion other than a discovery motion
Attend a preparation of a client for a deposition
Attend a pretrial conference
Attend a pretrial motion
Attend a scheduling, discovery or status conference
Attend a settlement hearing involving a minor
Draft or review documents relating to a non-dispositive motion
Draft or review documents relating to a dispositive motion
Draft or review a request for, or response to, discovery (e.g., interrogatories, production of documents, etc.)
Draft or review a summons and complaint and an answer
Draft or review an affidavit
Observe or assist in the electronic filing of a federal claim
Observe or assist in the service of a subpoena

Civil Rights/Community Justice/Commutations/Disability Law/Human Rights/Public Interest

Attend a civil rights hearing
Attend an intake interview at a civil rights agency
Attend a meeting of a civil rights commission or other governmental organization
Draft or review a civil rights complaint
Draft or review an EEOC / MDHR charge of discrimination
Investigate a civil rights complaint

Client Interviewing and Counseling

Attend a client closing meeting or exit interview

Attend a meeting to prepare a client for a proceeding or other matter.
Attend a meeting to review and evaluate a client matter
Attend a potential or existing client meeting (e.g., interview, fact gathering, or file review)
Draft or review a client invoice
Draft or review a retention letter or retention agreement
Draft or review written advice to a client

Common Professional Activities

Attend a bar association meeting
Attend a continuing legal education (CLE) program with your mentor
Attend a continuing legal education (CLE) program without your mentor (2-hour maximum credit per year for CLEs not attended with the student's mentor)
Attend a judicial, legislative or executive taskforce or other government created advisory group
Attend a judicial investiture
Attend an Inn of Court meeting at the invitation of your mentor or another attorney or judge
Draft materials for a continuing legal education (CLE) program
Draft materials for bar association publication

Compliance/Organizational Ethics and Compliance/Ethical Culture/Risk Management

Attend a code of conduct training event
Assemble a data map for data held in the course of business
Attend a regulatory audit
Attend a SOC (1, 2, or 3) audit and review findings or attestation
Audit an existing vendor for compliance with contractual information protection provisions
Audit for PC-DSS compliance
Audit ISO policies or HIPAA manual and procedures
Draft or review a code of conduct
Draft or review a compliance program
Draft or review a Form ADV filing
Draft or review a HIPAA business associate agreement
Draft or review a HIPAA manual
Draft or review ISO 27001 ISMS policies
Draft or review a privacy program
Draft or review a vendor management/due diligence policy
Draft or review a vendor management/due diligence questionnaire
Draft or review a website privacy policy
Draft or review an information security addendum for vendors
Draft or review model contract clauses for US-EU data transfers
Inventory open source software components
Outline and audit PCI-DSS requirements for an organization
Participate in an investigation regarding code of conduct or compliance issues
Perform a gap analysis on existing policy programs
Register with an EU data protection authority (DPA) to facilitate international data transfers
Review effectiveness measurements
Review FTC enforce action on EU data processing issue

Review hotline statistics

Review the “Volker Rule” provision of the Dodd-Frank Act and its impact on financial compliance

Contracts/UCC/Sales (contract, franchise, sports, entertainment, art, business & commercial transactions)

Draft or review a contract

Draft or review a contract for the sale of goods

Draft or review a master services agreement

Draft or review a warranty disclaimer

Draft or review litigation documents concerning a disputed contract provision

Review and analyze the contractual issues raised by a sales transaction conducted electronically, either being negotiated or in dispute

Review the backside terms and conditions of a company’s purchase order

Credit and Payment Devices/Payment Systems/Consumer Law (collection, debtor rights, creditor rights)

Attend a hearing in a garnishment proceeding

Attend an administrative wage garnishment proceeding in a student loan case

Draft or review a complaint or answer in a debt collection matter

Draft or review a consumer rights complaint (FDCPA, FCRA, TCPA, CROA)

Draft or review an answer to a consumer rights complaint (FDCPA, FCRA, TCPA, CROA)

Review collection notes provided in discovery of a consumer claim

Review the Department of Education Student Loan Collection Manual

Review the garnishment process

Review the process for docketing a judgment and options for enforcement

Review types of payment systems a corporation uses in transacting its business

Criminal Law/White Collar Crime/Misdemeanor Defense/Sentencing (prosecution, defense, law enforcement)

Attend a contested restitution hearing

Attend a criminal motion hearing

Attend a criminal pre-trial, omnibus hearing or probable cause hearing, contested or uncontested

Attend a drug court proceeding

Attend a DWI proceeding

Attend a first appearance, arraignment or bail hearing, in-custody or out-of-custody

Attend a grand jury proceeding

Attend a hearing on a harassment restraining order

Attend a hearing on a motion to expunge/seal

Attend a mental health court proceeding

Attend a parole or probation revocation or parole violation hearing

Attend a plea hearing or allocution

Attend a re-entry court proceeding

Attend a restitution hearing

Attend a ride along with a police officer*

Attend a sentencing hearing

Attend a victim impact hearing

Attend an implied consent hearing

Attend traffic court

Draft or review a criminal complaint

Draft or review a criminal motion
Draft or review a restitution motion and affidavit
Observe or participate in some aspect of an execution of a search warrant
Research a criminal motion
Tour or inspect a jail, prison, or juvenile detention center*
Tour or inspect a medical examiner's facility*

Education Law

Attend a conference between school officials and parents to negotiate a change in policy
Attend a conference to negotiate special accommodations for a special needs child
Attend a court hearing to repeal a suspension or expulsion
Attend a school board meeting

Elder Law

Attend a care plan conference
Draft or review a letter to a nursing home or assisted living center administrator regarding a dispute or care concern
Draft or review a plan for a client's medical assistance spend down
Draft or review an application for medical assistance

Employment Law/Employment Discrimination

Attend a *Loudermill* hearing
Attend a veterans preference hearing
Attend an unemployment compensation hearing
Draft or review a covenant not to compete
Draft or review a severance agreement
Draft or review an employee manual
Draft or review an employment agreement
Review a non-disclosure agreement being negotiated
Review an employer's defense indemnification policy

Energy Law (public utilities, regulated industries)

Attend a hearing or trial involving a qui tam whistleblower under federal or state false claims act regarding energy contract
Attend a public utilities commission meeting
Attend an energy fraud and false claim hearing
Participate in the investigation of energy research grant fraud
Review a government contract with a private company for management of energy resources

Environmental Law

Attend a government enforcement action claim
Attend litigation for a private right of action claim
Draft or review a proposed environmental regulation
Draft or review an environmental permit
Review a domestic environmental regulation statute

Review an international environmental regulation, statute, or treaty

Estates & Trusts/Estate Planning/Federal Estate & Gift Tax (probate, guardianship, conservatorship)

Attend a conservatorship hearing

Attend a contested probate hearing

Attend a guardianship hearing

Attend a hearing on a final accounting

Attend a hearing on a report of an adult guardianship

Attend a hearing to appoint a personal representative

Attend a meeting related to trust funding

Attend a will signing

Attend an initial client conference with a new client beginning the estate planning process

Attend a hearing to remove a personal representative

Draft or review a basic or simple will

Review a client's comprehensive estate plan

Draft or review a durable power of attorney

Draft or review a follow-up letter of instruction after will signing

Draft or review a healthcare directive

Draft or review a petition to appoint guardian

Draft or review a revocable living trust

Draft or review a revocable trust funding letter

Draft or review a transfer on death deed, a deed reserving a life estate, or other real estate deed to affect an estate plan

Draft or review a will with a testamentary trust

Draft or review an annual report or accounting

Draft or review beneficiary designations of financial assets

Draft or review documents to establish a family LLC

Draft or review documents transferring property from probate

Draft or review documents transferring property to trust

Review portability in the estate planning process

Review an estate planning technique (e.g., GRAT, CRUT, ILIT, SLAT, FLIP-CRUT)

Review QTIP provisions and benefits of QTIP trusts

Family Law/Adoption/Domestic Abuse

Attend a child support hearing in the administrative child support process

Attend a collaborative family law process

Attend a family court contempt hearing

Attend a final hearing in a stipulated dissolution proceeding

Attend a financial early neutral evaluation (FENE)

Attend a meeting with a custody evaluator

Attend a meeting with a guardian *ad litem*

Attend a meeting with a parenting consultant

Attend a meeting with a parenting time expeditor

Attend a motion hearing

Attend a name change hearing

Attend a post-decree motion

Attend a pre-trial hearing (also known as a moderated settlement conference)
Attend a review hearing
Attend a social early neutral evaluation (SENE)
Attend a temporary hearing
Attend an evidentiary hearing for an order for protection
Attend an initial case management conference (ICMC)
Draft or review an antenuptial agreement
Draft or review postnuptial agreement.
Draft or review a marital termination agreement
Draft or review a petition for dissolution of marriage
Draft or review a petition for adoption and supporting documents
Draft or review a petition to adjudicate paternity
Draft or review documents seeking an order for protection
Draft or review proposed or final findings of fact, conclusions of law, order for judgment, and judgment decree
Draft or review stipulated judgment and decree

Federal Income Taxation/State & Local Tax, Taxation of Business Enterprises

Draft or review a protest of an IRS determination
Draft or review a request for tax-exempt status under section 501(c)(3)
Review a judgment and consider each of the federal and state tax consequences of the damage award from both the payer and the payee's point of view
Review with a non-profit fundraising person how much of the solicitation involves a discussion of tax consequences
Attend a tax court calendar call
Attend a tax court trial

Finance and Securities / Broker Dealer Regulation / Corporate Finance / International Finance (financial services)

Draft or review a credit agreement
Draft or review a financing agreement
Draft or review a loan agreement
Draft or review a preferred stock purchase agreement
Draft or review a private company shareholder register
Draft or review an underwriting agreement

Health Law

Attend a health care professional meeting regarding legal and administrative procedures in relation to a particular medical practice
Attend a health insurance denial appeal
Attend a meeting between hospital counsel and group of health care employees
Attend a meeting where a lawyer advises an individual about the risk and rewards associated with purchasing different types of health plans under MNsure
Draft or review a comment to the FDA regarding a proposed rule for medical devices, clinical trials, or drug development
Draft or review a comment to the Federal Trade Commission regarding anti-competitive behavior in the health care marketplace

Draft or review a comment to the U.S. Department of Health and Human Services regarding a proposed rule that implements a section of the Affordable Care Act

Draft or review a client advisory that analyzes a judicial opinion and explains the foreseeable consequences for a particular sector of the health care industry

Draft or review a HIPPA privacy notice for a doctor's office.

Draft or review a managed care provider contract

Draft or review an EMTALA notice of rights and responsibilities

Review an FDA 510-K submission on a medical device

Review how anti-kickback regulations impact health care compliance

Review how the food and drug administration regulations impact health care compliance

Review the purpose of a pharmacy and Therapeutics Committee and responsibilities of its members

Immigration

Attend a cancellation of removal hearing

Attend a Deferred Action for Childhood Arrivals (DACA) hearing

Attend a deportation hearing or trial

Attend a naturalization ceremony

Attend a pre-hearing client interview for detainee docket

Attend a tour of Customs and Border Patrol Operations (CBP)

Attend a USCIS liaison meeting between immigration officers and immigration attorneys

Attend a withholding of removal hearing

Attend an asylum hearing

Attend an Immigration Court Individual Hearing

Attend an Immigration Court Master Calendar Hearing (MASH)

Attend an "InfoPass" meeting

Attend an interview by immigration officer in a citizenship/naturalization, residency, asylum, or other immigration proceeding

Draft or review a Cancellation of Removal Form EOIR-42

Draft or review an EB-1 Petition

Draft or review an Employment Authorization Form I-765

Draft or review a Naturalization Form N-400

Draft or review an Adjustment of Status Form I-485

Draft or review an Advance Parole Form I-131

Draft or review an Application for Deferred Action for Childhood Arrivals (DACA) Form I-821

Draft or review an Asylum Application Form I-589

Draft or review an H2A Visa petition

Insurance Law (commercial litigation, business transactions)

Review an insurance appraisal

Review insurance coverage opinion

Review the process followed by a malpractice insurance carrier following the receipt of a claim

Intellectual Property - Copyright/Trademark

Attend a court proceeding where an artist asserts rights under the Visual Rights Acts (VARA)

Attend a meeting between in-house counsel for a corporation and its IP lawyers regarding infringement

Complete a copyright registration form (literary- form TX, visual arts- form VA, performing arts- form PA, sound recordings- form SR, single serials- form SE)

Conduct a preliminary or comprehensive trademark search

Draft or review a complaint regarding infringing works posted on the internet pursuant to ICANN rules for intellectual property defensive registration challenge policy

Draft or review a museum's policy for the restitution of looted art

Draft or review a petition to cancel a registered trademark

Draft or review a royalty agreement or royalty provision in an artist's contract

Draft or review a trademark application for a sound mark

Draft or review a trademark application for a sound recording

Draft or review a trademark license agreement

Draft or review a work-made-for-hire contract

Draft or review correspondence with the U.S. Copyright Office

Draft or review correspondence with the U.S. Patent and Trademark Office

Draft or review documents used in a domain name dispute pursuant to ICANN uniform domain dispute resolution policy

Draft or review a notice and opinion of potential refusal or acceptance of a trademark application

Draft or review a response to an Office Action issued by the U.S. Patent and Trademark Office

Draft or review an appeal of a trademark registration refusal to the Trademark Trial and Appeal Board

Draft or review an application for a government grant to fund an investment

Draft, review, or file a Section 8 affidavit of continuous use to maintain a registered trademark

Draft, review, or file a Section 9 application for renewal of registered trademark

Prepare a depiction of the mark to be submitted with a trademark application (e.g. standard character drawing, special form drawing, color drawing)

Review a certificate of registration for a trademark

Research a collective provenance

Research or investigate an artist's claims under the Visual Rights Act (VARA)

Review a database of looted art from WWII

Review a license agreement for some form of intellectual property

Review a museum's provenance list

Review a notice of allowance

Review a registered copyright certificate

Review a trademark application and the applicable history

Review a watch report for possible infringements with a trademark

Review compulsory license application for making and distributing phonorecords

Review proposed amendments to the U.S. Copyright Act of 1976

Review the Digital Millennium Copyright Act

Review the U.S. Patent and Trademark Office Director's annual report to Congress

Review the USPTO's acceptable identification of goods and services manual

Intellectual Property – Patent

Attend a Markmen or Claim Construction hearing in a patent infringement suit

Attend a meeting between in-house counsel for a corporation and its IP lawyers regarding infringement

Attend a meeting with the inventors and the lawyers involved in writing a patent application

Attend an interview with a patent examiner

Draft or review a business plan to fund an invention

Draft or review a patent application
Draft or review a patent protest under 37 CFR 1.291
Draft or review a request to extend a patent term
Draft or review an international patent application
Draft or review forms to be used in an ex-parte reexamination of a patent application
Draft or review a work-made-for-hire contract
Draft or review an application for a government grant to fund an invention
Draft or review correspondence with the U.S. Patent and Trademark Office
Draft or review a response to an Office Action issued by the U.S. Patent and Trademark Office
Draft or review forms to be used in an ex-parte reexamination of a patent application
Inspect a product pending a patent
Review a license agreement for some form of intellectual property
Review a patent file history and issued patent; make a comparison to the current marketplace
Review a prior art in order to provide an assessment of the patentability of an invention or process

International Law

Attend a hearing before the International Court of Justice
Attend a reading of a judgment by the International Court of Justice

Jurisprudence and the Work of a Judge (judges, court personnel)

Attend a meeting between a judge and a judicial clerk or staff attorney
Draft or review a bench memorandum
Draft or review a judicial opinion
Draft an order for a judge
Review the file management system of the judge or court administration, review the policies related to document retention, organizational structure, confidentiality issues, and public accessibility
Review the various administrative roles of a judge (hiring personnel, budgetary matters, committee assignments)

Juvenile Law

Attend a contested probable cause hearing in juvenile court
Attend a contested Rule 20 hearing in juvenile court
Attend a delinquency court trial in Juvenile Court
Attend a detention hearing in Juvenile Court
Attend a disposition hearing in Juvenile court
Attend a family case planning conference for a juvenile held in detention
Attend a juvenile court pre-trial brain-storming session
Attend a meeting with a juvenile's guardian ad litem
Attend a Juvenile Justice Council meeting
Attend a juvenile traffic court session
Attend a meeting with a juvenile probation officer
Attend a petty court trial in juvenile court
Attend a pre-hearing interview with a juvenile
Attend a probation violation hearing in Juvenile Court
Attend a truancy review hearing in juvenile court
Attend an adult certification hearing in Juvenile Court
Attend an initial appearance in Juvenile Court

Attend an initial client meeting between a child, his attorney, and his parents where the child's rights, the child's charges, and the juvenile court procedures are explained

Attend an intake/case planning conference at a juvenile placement facility

Review a petition and the associated reports for an adult certification hearing, and debrief with either a juvenile defense attorney or a juvenile prosecutor

Labor Law

Attend a civil service labor dispute

Attend a collective bargaining session

Attend a grievance proceeding

Attend a labor arbitration

Attend a union board meeting

Attend a National Labor Relations Board Hearing

Draft or review a union benefits plan

Review a National Labor Relations Board Decision

Law Firm Practice/Small Firm Practice/Accounting for Lawyers/ Business Planning

Attend a law firm in-house training session on lawyering skills or professionalism

Attend a law firm marketing event

Attend a law firm practice group meeting or meeting between partners and/or associates

Attend a meeting of the partners of a firm

Review a small firm's business plan

Review a small firm's marketing plan

Review policies related to client confidentiality

Review the file management and file retention system of a law firm and the organizational structure of client files

Review the forms, process and procedures of an IOLTA trust account, maintaining records and books, filing taxes, and a firm's business formation

Review the various administrative roles of a solo or small firm practitioner.

Lawyering Skills/Advanced Legal Research (motion practice, appellate)

Attend a County Law Library Board meeting

Attend an in-house practice for an oral argument

Attend an appellate oral argument

Attend a hearing regarding a proposed state or federal rule change

Draft or review a petition for review

Draft or review an appellate brief

Draft or review preparation materials for an appellate oral argument

Research administrative law materials, government documents, or other court documents

Research and draft a memorandum of law

Research and draft an internal office memorandum

Research the legislative history of statute or regulation and review how to interpret it

Research published comments to a proposed regulation issued by a government agency (FDA, USDA, etc.)

Research statutes or case law

Legislation (lobbying, legislative)

Attend a legislative activity

Attend a legislative committee hearing or floor debate
Attend a lobbying activity
Draft or review proposed legislation

Mergers & Acquisitions

Draft or review a disclosure schedule on the buyer or seller side
Draft or review a "Materiality Scrape" within a purchase agreement
Review a certificate of merger
Review a due diligence memorandum
Review a merger agreement
Review a senior or junior credit agreement
Review a subordination and intercreditor agreement
Review an ancillary M&A document (e.g., consulting agreement, escrow agreement, employment agreement, non-compete agreement, etc.)
Review an asset or stock purchase agreement
Review disclosure provisions of a corporate purchase agreement
Review representations and warranties section of a purchase agreement and the corresponding disclosure schedule
Review seller contracts in an asset sale to determine if consent to assignment is required
Review strategy for or participate in acquisition due diligence
Review the process for the purchase price calculation of a merger and acquisition transaction

Military Law (JAG, veteran rights)

Attend a military board
Attend a military trial
Attend a veteran's court proceeding
Attend a veteran's court staffing meeting
Review the Uniform Code of Military Justice

Native American Law

Attend a gaming commission meeting
Attend a trial or hearing in Tribal Court
Draft or review an application for tribal membership

Negotiations

Attend a negotiation (i.e., a discussion with the opposing party or counsel regarding resolution of issues that work towards resolution)

Poverty Law (pro bono, pro se, legal aid, public interest)

Attend a legal services board meeting
Attend a matter involving a pro se or unrepresented party
Attend or participate in a Pro Bono matter
Observe or assist in the client screening process of a legal services organization

Professional Responsibility (discipline, attorney malpractice)

Attend a reinstatement or disciplinary hearing before a Lawyers Professional Responsibility Board panel or referee
Attend an appellate oral argument before the Minnesota Supreme Court in an attorney discipline case
Review a complaint against a lawyer alleging professional liability
Review a disciplinary complaint against a lawyer
Review an expert affidavit in a professional liability matter

Property/Real Estate Development/ Land Use (real estate, housing, zoning, planning & land use)

Attend a closing on a bond issuance
Attend a commercial real estate closing
Attend a hearing in a condemnation case
Attend a hearing regarding a real property dispute, such as an unlawful detainer action or partition action
Attend a homeowner's association meeting
Attend a housing court proceeding
Attend a land-use planning appeal
Attend a land-use planning or zoning commission meeting
Attend a public housing grievance hearing
Attend a residential real estate closing
Draft or review a commercial lease
Draft or review a commercial purchase agreement
Draft or review a contract for deed/purchase agreement
Draft or review a quit claim deed or warranty deed
Draft or review a residential lease
Draft or review a residential purchase agreement
Draft or review a title insurance commitment/policy
Draft or review a title opinion
Draft or review an association lien notice
Draft or review an easement agreement
Draft or review declaration/bylaws for a homeowner's association
Draft or review documents creating a limited liability company to hold real estate
Draft or review documents creating a town home or condo homeowner's association
Draft or review seller's or buyer's closing documents
Observe or assist in a title search
Observe or participate in a tract, title, or judgment search at the County Recorder's office
Review a condemnation case or reverse condemnation case and evaluate whether there is a taking
Review a title commitment
Review an abstract of title
Review and participate in the process of a foreclosure of a mortgage by advertisement
Review and participate in the process of foreclosure of an association lien

Securities Regulation

Draft or review a federal securities filing for a public corporation (prospectus, Form 10-Q, Form 10-K, Form 8-K, etc.)
Draft or review a Form D filing
Draft or review a No Action Letter to the SEC
Draft or review a proxy solicitation for a shareholders' meeting
Observe or assist in the determination of whether private stock issuance is exempt from registration

Review a public company stock registration statement

State and Local Government (commitments, municipal law, government contracts)

Attend a city council meeting

Attend a civil commitment hearing

Attend a commitment appeal panel

Attend a county board meeting

Attend a metropolitan council meeting

Attend a pre-petition screening medical exam in connection with a civil commitment proceeding

Attend a public hearing for state or local government

Draft or review a joint power agreement

Torts (personal injury, medical malpractice, products liability)

Attend a case evaluation panel on a torts case organized through the Minnesota Association for Justice or Minnesota Defense Lawyers Association

Attend a jury focus group to prepare case strategies and themes for trial

Draft or review a settlement agreement

Draft or review a demand letter to a defendant / insurance carrier / or a written settlement offer to a plaintiff

Review the medical records of an injured party and/or prepare a medical summary

Review a release of liability and assumption risk

Visit the scene of a disputed torts incident (site inspection)

Trial Advocacy/Evidence (litigation)

Attend a closing argument

Attend a cross-examination of a witness at trial

Attend a direct examination of a witness at trial

Attend a jury instruction conference

Attend a lay witness meeting

Attend a motion for directed verdict

Attend a motion *in limine*

Attend a *voir dire* (jury selection)

Attend an expert witness meeting

Attend an in-house mock jury trial conducted by a lawyer in preparation for trial

Attend an opening statement

Attend any meeting between opposing counsel or opposing parties

Attend any meeting between the trial judge and trial counsel during the course of a trial

Attend arguments regarding evidentiary objections raised at trial

Create or review a trial notebook

Draft or review a special verdict form

Draft or review a trial memorandum

Draft or review jury instructions

Draft or review motions *in limine* for a trial

Draft or review a pre-trial order

Draft or review questions for *voir dire*

Draft or review witness or exhibit lists

Review a complete deposition transcript of a fact witness

Review a complete deposition transcript of an expert witness

Workers' Compensation

Attend a .239 Conference

Attend a client meeting regarding settlement options and case valuation

Attend a medical or rehabilitation conference

Attend a stipulation status conference

Attend a workers' compensation asbestos settlement conference

Attend a workers' compensation attorney fee hearing

Attend a workers' compensation expert medical deposition

Attend a workers' compensation expert vocational deposition

Attend a workers' compensation hearing

Attend a workers' compensation mediation/arbitration

Attend a workers' compensation pretrial conference

Attend a workers' compensation settlement conference

Calculate potential exposure/benefits owed

Draft or review a notice of intent to discontinue or petition to discontinue

WILD CARD EXPERIENCE

Engage in any experience with or under the supervision of your mentor that is not one of the identified experiences.

DIRECTOR-APPROVED EXPERIENCE

Engage in any experience with or under the supervision of a lawyer or judge who is not your mentor for which you have received approval in advance from the director.

APPENDIX B: DEBRIEFING TOPICS AND TEMPLATES: A CONVERSATION GUIDE

Students may also download Debrief Templates from the [Mentor Externship Canvas](#).

Appellate Argument Template

1. What assumptions do attorneys seem to be making about the judges' knowledge of the facts and the law? Do these assumptions seem to change as the argument progresses and the judges ask questions? What balance do the attorneys strike between an advocate's duties to both educate and persuade the judges?
2. If the judges asked questions, what do these questions reveal about the judges' opinions about the law or facts? What do these questions reveal about the judges' jurisprudential schools of thought? How well do the attorneys use these questions to help their cases? Compare the depth or detail of the answers to the judges' questions to that of the attorneys' arguments generally.
3. What role does speaking ability and forensic performance skills seem to play in whether the attorneys' arguments are persuasive? In the argument observed, does the attorney with the more persuasive or polished argument style make up for weak substance, or not? Do the judges react differently to the weaker advocate?
4. How do the attorneys treat each other's arguments? How do they refer to each other in argument? What tone or attitudes do they project towards the other side? How do the students and the judges react to that tone or attitude?
5. Did oral advocacy add anything to the judges' understanding of the case? Could the substance have been just as effectively presented in the written appellate briefs?
6. After observing the argument, what impressions are you left with regarding the attorneys' credibility and competence? Upon what factors is that impression based? Was there anything in the arguments that seemed to go beyond the reasonable bounds of advocacy?

The Honorable Patrick J. Schiltz

Appellate Argument / Contract Issue Template

1. Was the contract oral or written?
2. Was the entire business relationship between the parties captured in one contract? Did aspects of their relationship extraneous to the specific contract at issue seem relevant to the arguments presented?
3. Did the contract involve parties with equal bargaining power?
4. Does it appear that the parties involved actually bargained over the issue that was being litigated? Was the contested issue directly addressed in the language of the contract?
5. Was there any evidence of the parties' actual intent with respect to the disputed issue introduced in argument? What sort of evidence was it, i.e., deposition testimony about conversations, or actions taken in reliance on the contract?
6. What type of contract principle was at issue in this case: consideration, formation, interpretation?
7. What types of legal authorities were presented to support the arguments of the litigants: statutes, case law, sections of the Restatement (Second) of Contracts, or treatises?

Professor Elizabeth Schiltz

Arbitration Template

1. Did the litigants agree to have their dispute resolved through arbitration or was the arbitration court-ordered? Was the arbitration binding or non-binding? If the arbitration was binding, what constitutional rights do the parties waive in a binding arbitration? How is the legal impact of binding arbitration communicated to the client?
2. How was the arbitrator selected? Who paid the arbitrator's fee and how much was it?
3. Did the arbitrator appear neutral? What was the arbitrator's role? What responsibility, if any, does an arbitrator have in making sure the evidence is properly submitted? For example, if the arbitrator "assists" the attorney in asking the appropriate foundational questions to elicit expert witness testimony, will the arbitrator be perceived as an advocate? If the arbitrator does not assist in asking the proper questions, will the parties receive a fair hearing?
4. How does arbitration differ from a jury trial procedurally? How are the two proceedings similar? Do the attorneys take testimony during arbitration the same way they would during a jury trial?
5. What are the advantages and benefits of arbitration? What are the disadvantages?
6. What documentation did the attorneys submit to the arbitrator to support the claim?
7. How long did the arbitrator have to decide the claim? What was the result? Did the result seem fair?
8. What if one of the litigants does not like the outcome of a binding arbitration? Can a litigant appeal an award of arbitrator?

Associate Dean Lisa Montpetit Brabbit

Balance Template

1. What specific activities do you plan in order to achieve balance in such a demanding profession? Do you plan for personal time? Do you need to?
2. What limits do you set on your work in order to prevent over-working and/or burnout?
3. Do you regularly prioritize the different demands on your time? How do you determine order of priority, and what factors play a role in that determination—urgency, immediacy, overall importance?
4. What roles define you as a person: e.g., parent, volunteer, sibling, spouse, professional, golfer, etc.? What roles are the most important to you? Do your “most important” roles receive the greatest amount of time and attention? If not, why not?
5. What do you do to keep a healthy perspective in the face of a highly difficult/demanding work load, pressure to bill a certain number of hours, client needs, etc.?
6. Does your employment setting promote a healthy balance and lifestyle? How?

Associate Dean Lisa Montpetit Brabbit
and Jon Barga ('06)

Billing Template

1. What are the most important skills a lawyer can develop in order to bill their time accurately, honestly, and fairly?
2. What are the conflicts that arise around the issue of effective representation vs. financial limitations of the client?
3. What ethical issues most commonly cause tension in the billing process?
4. What hourly fee do new lawyers charge at your firm? Senior lawyers? How are billing rates determined? What factors are considered? Do you personally have any input on your rates?
5. Does your firm offer any alternatives to traditional hourly billing like: flat rates, hourly sliding scale, menu billing?
6. Does the rate a client can pay affect how you prioritize your work? Does it affect the types of cases you agree to handle?
7. Are there explicit or implicit expectations to bill a certain number of hours in your work environment?
8. Does the pressure of billable hours affect your thought process or work in general?
9. How are your hours recorded: paper, dictation, or electronically? Who reviews the bills before they are sent to the client?
10. How often do clients dispute a bill? How you respond to such client inquiries?
11. How detailed do the billing statements need to be?
12. What percentage of your billings goes uncollected? Does your rate of collection affect your own pay?
13. What conversations do you have with clients about billing at the beginning of your representation? How do you broach the topic?

David M. Bateson

Civil Motion Template

1. Who brought the motion and for what purpose?
2. Was the motion dispositive or non-dispositive?
3. Did the parties file other documents with the motion (e.g., affidavit, proposed order, notice of motion)?
Are these other documents a necessary part of this procedural request?
4. Who argued first at the hearing? How was the issue presented?
5. How did opposing counsel refute the motion? Were they persuasive?
6. Did the judge rule from the bench? If not, how long does the judge have to take the matter under advisement and make a ruling?
7. How did the timing of the motion impact the procedural posture of the claim?
8. What procedural rules applied to this motion?
9. What was the outcome? Do you agree with the ruling? How does the ruling impact the pending claim(s)?

Associate Dean Lisa Montpetit Brabbit

Client Counseling Meeting Template

1. How did the attorney prepare to counsel the client? How much time did it take? What additional preparation would have been helpful?
2. How did the attorney begin the client meeting? Did the attorney outline the purpose of the meeting for the client?
3. How did the attorney identify or confirm the client's goals?
4. What options did the attorney outline for the client?
5. Did the attorney discuss the pros and cons of each option? How?
6. How did the attorney demonstrate that they were listening to the client? Did the attorney confirm the client's understanding of the information provided? How?
7. How did the attorney involve the client in the discussion? Did the client offer or ask about other options? Did the client ask questions? What questions did the client ask and how did the attorney respond?
8. Did the client ask for the attorney's recommendation on what to do or next steps? How did the attorney respond?
9. Did the client ask the attorney about their chances of "winning"? How did the attorney respond?
10. Discuss the closing of the counseling meeting. How did the attorney let the client know what would happen next? Do you think the client was comfortable and understood the next steps in the process?
11. What ethical issues came up during the counseling? How did the attorney and the client handle them?

Uyen Campbell, Director, Mentor Externship

Client Interviewing Template

1. How did the attorney prepare for the client interview? How much time did it take? What additional preparation would have been helpful?
2. What is the client's purpose in obtaining legal advice? How did the attorney define or clarify this purpose during the interview? Do you think the attorney assisted the client to think through all the dimensions of the client's problem?
3. Discuss the beginning of the interview. How was the opening appropriate or not appropriate for the circumstances? Did the attorney attempt to make the client more comfortable or less anxious? Were their attempts successful?
4. When did the attorney educate the client on attorney-client confidentiality? What other general issues did the attorney need to explain to the client? How and when were these issues explained?
5. Evaluate the attorney-client relationship established through the interview. Discuss the emotional, educational, and contractual elements of the relationship. How was each element present in the interview?
6. How did the attorney gather the facts of and information about the case? What questioning strategies did they utilize? Were they successful? Did the attorney define the "scope" of the representation?
7. How were the client's memory, perception and state-of-mind important to the interview? What strategies or techniques did the attorney use to get accurate information from the client?
8. Was the fee agreement discussed during the interview? How and when did the attorney introduce this subject? Was the fee arrangement negotiated between the attorney and the client or presented by the attorney and accepted by the client? Was an engagement letter signed? Was a retainer required? Discuss how the attorney handled this discussion and the advantages and disadvantages of their approach.
9. Discuss the closing of the interview. How did the attorney let the client know what would happen next? Do you think the client was comfortable and understood the next steps in the process?
10. What ethical issues came up during the interview? How did the attorney and the client handle them?

Associate Dean Lisa Montpetit Brabbit

Closing Argument Template

1. Was the theme of the case clearly and effectively presented? Did the lawyer tell a compelling story?
2. Were all relevant and important facts included in the closing? Did the lawyer fail to convey an important fact?
3. How did the lawyer handle the weaknesses of the case?
4. Did the lawyer read from a prepared script? How would you evaluate the presentation of the case?
5. In a civil case, how did the lawyer argue the damages? Was it effective?
6. Did the lawyer use exhibits? Were they used effectively? Were they persuasive or helpful?
7. Did opposing counsel raise any objections during the closing statement? Were the objections sustained or overruled?
8. Evaluate the lawyer's non-verbal communication during closing argument. Did the lawyer have any distracting habits?
9. Do you agree with the verdict?

Associate Dean Lisa Montpetit Brabbit

Contract Negotiations Template

1. How much of the drafting work consisted of composing original language, and how much consisted of adapting form contract provisions?
2. Were there any contractual issues that the client hadn't considered, that the lawyer was able to warn the client should be addressed?
3. Were there any issues that the lawyer brought up that the client decided she would rather not address directly in the contract?
4. What issue in this deal does this lawyer think is most likely to lead to litigation in the future? How is this issue addressed in this contract?
5. How carefully does the lawyer think her client is reading the drafts of the contracts during the negotiation process?

Contracts / Litigated Template

1. Was the contract oral or written?
2. Was the entire business relationship between the parties captured in one contract? Do aspects of their relationship extraneous to the specific contract at issue seem relevant to the case?
3. Did the contract involve parties with equal bargaining power?
4. Does it appear that the parties involved actually bargained over the issue that was being litigated? Was the contested issue directly addressed in the language of the contract?
5. What sorts of evidence of the actual intent of the parties with respect to the disputed issue has been gathered? What will be introduced in court?
6. What type of contract principle was at issue in this case: consideration, formation, interpretation?
7. What legal arguments can you think of to support the position of the client represented here?

Professor Elizabeth Schiltz

Credit and Payment Devices / Delinquent Loan Template

1. What is the interest rate on the loan? Did the interest rate change over the course of the loan?
2. What happens under the loan contract if the borrower is late in making a payment?
3. What happens under the loan contract if the borrower wants to pay the loan off early?
4. Where was the borrower when she signed this loan contract: in her home, in the lender's office, in a store?
5. Did the borrower compare the interest rate on this loan to interest rates on comparable loans offered by other lenders? Could this borrower have gotten this loan from any other borrower?
6. Did the borrower understand the terms of this loan when he borrowed the money? How do you know? Did the lender make any attempt to determine this?
7. Do the terms of this loan or the circumstances of the transaction violate any law?

Professor Elizabeth Schiltz

Credit and Payment Devices / Interview with In-House Lawyer Template

1. What percent of the corporation's bills are paid by cash, check, credit card, electronic fund transactions, letters of credit, promissory notes, or by securitization? What considerations dictate which form of payment is used?
2. What sorts of payment devices does the corporation accept from the people who owe it money? What considerations dictate which forms of payment are accepted?
3. Has the corporation ever been the victim of fraud in a payment device used by its customers? If so, what was the resolution of that incident?
4. How does the corporation protect itself from embezzlement by its employees who are authorized to pay bills for the corporation?

Professor Elizabeth Schiltz

Cross-Examination Template

1. Was the witness important? Why?
2. What did the lawyer hope to accomplish on cross-examination? Did that happen? What main points did the lawyer hope to establish?
3. Did the cross-examination help or hurt the opposing party's case?
4. How long was the cross-examination? Was it shorter or longer than the direct examination?
5. Did the lawyer ask all leading questions? Did the lawyer ask any open-ended questions? Did the lawyer take any risks with the witness?
6. How credible was the witness? Was the witness able to explain their answers? Did the lawyer keep control over the witness? What objections were raised? Were they sustained or overruled?
7. Think about how the lawyer phrased the questions. Were they short and to the point? Were they compound questions? Were they easy to follow?
8. Did the lawyer advance or support their theme through the cross-examination? Did the lawyer ask the "one-question-too-many?" What was the "one-question-too-many?"
9. Did the lawyer argue with the witness? Was the witness hostile? What techniques did the lawyer employ to deal with the hostile witness? Were they effective? What help, if any, did the lawyer ask of the judge?

Associate Dean Lisa Montpetit Brabbit

Demand Letter Template

1. If you are the plaintiff, when and under what circumstances would you send a demand letter?
2. What should you include in the demand letter? Are the necessary elements of the claim all outlined in the letter? What attachments do you include? What do you need to demonstrate to meet your burden of proof?
3. How are the damages outlined in the demand letter?
4. How does the demand letter play into the overall settlement strategy? How does the demand letter fit with the ADR strategy?
5. Was the demand letter effective in bringing closure to the claim?

Associate Dean Lisa Montpetit Brabbit

Deposition Template

1. Do depositions seem to be an efficient way for the parties to get information from witnesses?
2. What does a deposition offer that written interrogatories or informal interviews do not?
3. What is more difficult: taking a deposition or defending a deposition? Why?
4. What are the two or three most important things to remember in preparing to take a deposition?
5. Can you raise objections if the witness is not your client? When and under what circumstances?
6. What are the most common abuses that occur at depositions? How effective are the formal rules – such as Fed. R. Civ. P. 30(c)(2)(requires objections to be “stated concisely and in a non-argumentative and non-suggestive manner) or Fed. R. Civ. P. 30(d)(2)(permits courts to impose sanctions) – at curbing such abuses?
7. Is the only goal or objective of taking a deposition to gather facts? How are depositions used at trial?
8. If the attorney could change any of the rules governing the conduct of depositions, what rule would they change? Why?

Direct Examination of Lay Witness Template

1. Why was the witness called to testify? What facts did the witness present that were critical to the case?
2. Did the direct clearly and efficiently present the facts of the case? If not, why not? What could the lawyer have done differently?
3. Did the lawyer ask all open-ended questions? Did the lawyer use any leading questions?
4. What were the key elements of the direct examination? Did the lawyer follow an outline? Did the lawyer advance their theme of the case? Did the direct examination tell a story? Was it organized efficiently? Did the lawyer listen to the answers of the witness?
5. What did the lawyer do to solicit facts from the witness related to burden of proof?
6. What objections were raised and why? Were the objections sustained or overruled?
7. Who received more attention during the direct examination, the lawyer or the witness?
8. Was the witness credible?
9. Did the lawyer use exhibits? Was the use of exhibits effective?

Associate Dean Lisa Montpetit Brabbit

Drafting Judicial Opinions / Judicial Administration Template

1. How are the cases assigned? For district court judges, what type of administration system is used in the judge's district? Does it vary by district?
2. What process does the judge follow in researching the legal issues involved and writing the opinion? What can the judge consider in deciding the outcome of a hearing?
3. How important are deadlines for lawyers? What happens if a lawyer misses a court deadline?
4. Whose voices are involved in the journey from hearing to written opinion?
5. How often is the judge responsible for the opinion consult other judges, law clerks, or court staff?
6. What other court employees are involved in judicial administration, and what are their roles in maintaining efficiency and quality within the individual court and the court system?
7. In what ways are financial concerns involved in the administration of cases on a day-to-day basis? Does every judge have a law clerk? An administrative clerk?
8. How and in what ways do personal and professional biases affect the effective administration of justice?

Ethical Leadership in Corporate Practice Template

1. Who is the mentor's client? How does the client define the lawyer's objectives?
2. To what degree do lawyers in corporate practice give independent judgment to the client? Does the lawyer give just technical legal advice?
3. What if the corporate officer does not follow the lawyer's advice?
4. How is a corporation's culture established? What role does corporate counsel, whether in-house or outside counsel, play in building or maintaining a corporation's culture?
5. If corporate ethics and corporate culture are a "top down" phenomenon, how do lawyers best assist senior managers and board members in developing the vision and culture of a company and its employees?
6. It is likely that in the minds of many lawyers and classically trained business executives, the first question asked, or filter applied to any decision is whether or not the proposed action is lawful. Should the first filter instead be to ask whether or not the action is ethical and then proceed with the analysis of legality once it has been determined to be the right thing to do? If the first filter is legality, does it lead to poor decision making because lawful conduct is subsequently rationalized as being ethical? In other words, does an initial legal analysis tend to short-circuit or obscure the consideration of ethical factors?
7. Edmund Burke once said, "All that is necessary for evil to triumph is for good men to do nothing". What role do lawyers play in demonstrating "moral courage" in connection with corporate decision making? Is the courage to force explicit recognition of ethical issues one of the values counsel brings to the corporate decision making process? What positive and negative influences operate in this regard when a lawyer is an in-house counsel versus an outside attorney?
8. Time and again we see institutions trying to shield themselves from misconduct by erecting barriers instead of reforming or eliminating bad actors. Yet the NYSE Corporate Accountability and Listing Standards Committee has observed "No code of business conduct or ethics can replace the thoughtful behavior of an ethical director, officer, or employee". Would you agree that in the end, the best defense against corruption is more virtue, not more rules? If not, why not? How do we set about creating more virtue and what role do lawyers play in imparting or teaching core virtues such as truth-telling and promise-keeping?

Professor Neil Hamilton

Expert Witness Deposition Template

1. What did the lawyer review to prepare for the deposition?
2. What did the expert review to prepare for the deposition? Are the documents the expert reviewed to prepare for the deposition discoverable by opposing counsel?
3. Did the attorney prepare an outline of topics or questions to cover during the deposition? Did the attorney rely on the outline?
4. Did the attorney have the opportunity to meet with the expert prior to the deposition? For what purpose?
5. What was the purpose of the deposition? Why was the expert hired? What special knowledge does the expert have?
6. How was the expert located and selected?
7. What are the costs associated with the deposition? With the expert's time? Who pays the costs?
8. What does Fed. R. Civ. P. 26(a) say about disclosing information regarding expert witnesses?
9. Did the expert prepare a report prior to testifying? Was the report provided to the other parties to the lawsuit?
10. Does the expert have the opportunity to review the deposition transcript for accuracy? When and how is this accomplished?
11. Are all expert witnesses who are expected to testify at trial subject to deposition prior to trial? Do the state rules and the federal rules differ? If the expert is not deposed prior to trial, how do the parties discover the facts known and opinions held by the expert?
12. How did the attorneys lay the proper foundation?
13. What objections were raised? Were the objections proper? What was the basis for the objection?
14. Did the attorneys thoroughly explore the opinions of the expert? Could additional questions have been asked of the expert?
15. Did the attorneys thoroughly explore the background (education, experience, scholarship, etc.) of the expert? Why is background relevant to the finder of fact?

Associate Dean Lisa Montpetit Brabbit

File Management Template

1. Once the retainer agreement is signed, what is the process for opening up a client file? What is the purpose of the file management system?
2. How is the file identified (e.g., numerically, alphabetically)? How are client files organized? How are individual files organized?
3. Do the lawyers track any data on each file (e.g., case turn-around time, time spent in the court system, reports on oldest to newest files)?
4. Does the file management system include a conflict check? How is the conflicts check administered for new files? What is considered a conflict? What rules apply?
5. Does the file management system include a statute of limitations notice? If so, how many and how often before the statute runs?
6. Is the file management system a paper system, electronic system, or a combination of both?
7. Does the client receive the file when the matter is concluded? Does the firm retain any documents or all of the file? How long is the file kept in the office after the matter is concluded? What is the retention policy?

Associate Dean Lisa Montpetit Brabbit

**“Fostering Professional Ideals:
Can the Law Schools and the Profession Do Better?”
Template**

1. The law school experience begins a process of socialization into what the profession honors and values. Some scholars believe that the new law student is largely socialized after the first year. Based on their experience, what principles and qualities do the law students think the law school culture and the culture of the profession most honor and value? Are the espoused ideals different from the reality the student is experiencing?
2. Based on their experience, how do mentors answer the same question? What messages do the law firms and law departments send about professional ideals and what is most important in the practice of law?
3. Among the ideals our profession strives to achieve, where do we have the most room for improvement? What could be done specifically to reduce the gap between the espoused ideal and the reality of the practice?
4. In terms of the gap between professional ideals and practice reality, what can we learn from Enron, WorldCom and other current instances of corporate wrongdoing and the role of lawyers in these events? How can we reduce the gap? Is it a matter of more rules?
5. The Preamble to the Rules calls lawyers to be a representative of clients, an officer of the legal system and a public citizen having a social responsibility for quality of justice. Are all three of these roles actually realized in the practice? Do zealous advocacy and the money that rewards it dominate the other two roles? If so, can that be remedied?
6. Do mentors and law students see the practice of law as a calling? What does that mean? How could the law schools and the profession encourage actually living this approach to the practice?

Professor Neil Hamilton

Grades and the Profession Template

1. In order to be competent at our profession, a lawyer must have both sufficient doctrinal knowledge of the major fields of substantive law and procedural law and fundamental lawyering skills. The 1992 ABA MacCrate Report lists the fundamental lawyering skills as: Problem Solving; Legal Analysis and Reasoning; Legal Research; Factual Investigation; Communication (written and oral); Counseling; Negotiation; Litigation and ADR Procedures; Organization and Management of Legal Work; and Recognizing and Resolving Ethical Dilemmas.
 - a. What do your grades in law school tell you about your progress in learning the necessary doctrinal knowledge and fundamental skills to practice law?
 - b. What does a “C” mean in this context? A “B”? An “A”? What about a grade below a “C”?
2. The MacCrate Report lists the following fundamental professional values for the practice of law: Provision of Competent Representation; Striving to Promote Justice, Fairness and Morality; Striving to Improve the Profession; and Professional Self-development. What do grades tell you about your progress in learning those fundamental values?
3. Do you know the grades and class rank of your dentist? Your doctor? Your priest or minister? If not, what does that tell you? Why do you go back to them? Do you think a doctor who graduated in the bottom half of the class can provide you the help you need? What are the skills or virtues that lead you to trust your doctor, dentist or clergy? Are they applicable in our profession?
4. Are grades simply a ranking device to tell employers your capability at certain skills and knowledge relative to others? Do grades provide any information for your own life choices? For example, if you received lower grades in college in the sciences or math, did that result give you any useful information for your own life choices?
5. Why do the larger firms emphasize grades and class rank so much?
6. Does the culture that we (your class and the professors) are developing honor each person as a whole person for the contribution that each can make? Are we finding a path where we can honor both academic achievement and other contributions?

Professor Neil Hamilton

Hennepin County Professionalism Committee Template

1. Talk to one of the committee members of the meeting. What is the mission of the committee? What are the goals of the committee? Are they different?
2. Did the discussion at the meeting address ways in which lawyers can prevent ethics violations?
3. Who are the members of the committee and how are they selected? Is there a screening process?
4. Does the committee address current issues and trends in the profession?
5. Do the discussions strictly focus on the rules? Do the discussions address professional aspirations?
6. Is the committee successful in obtaining its stated goals and furthering its mission?

Associate Dean Lisa Montpetit Brabbit

Housing Court Proceeding Template

1. Was the action initiated by the tenant or the landlord? For what reason? What steps did the complaining party take to initiate the proceeding?
2. Were one or both parties represented by attorneys? If not, how did the lack of attorney representation impact the proceeding, if at all?
3. What role, if any, did a written or oral lease play in the proceedings? Were any parts of the lease (contract) in dispute?
4. What type of settlement attempts were made before the housing court trial? Discuss the bargaining power of each party and how that might have impacted the possibility of settlement.
5. Was the case heard by a judge or a referee? What is the difference?
6. Was an ERTA (Emergency Remedy Tenant Action) involved in this case? Explain the purpose of an ERTA.
7. What public policy issues and/or social justice issues did you think about while observing housing court? What types of action could be taken to mitigate the problems that cause people to end up in housing court? Who should be taking action?
8. What legal steps must a landlord take to evict a tenant? What can a tenant do to avoid eviction?
9. How are housing court proceedings different from other court proceedings that you have observed?
10. What is the Implied Warranty of Habitability? What remedies does a tenant have for a landlord's breach of the Implied Warranty of Habitability? Was this principle an issue in the proceeding you observed?

Integration of Faith in Work Life Template

1. What roles does faith play in your daily work as an attorney or judge?
2. Does faith affect decisions on: What clients to take? What type of law you focus on? Your methods of practice? Your methods of counseling? Your written opinions?
3. Is faith life solely personal and private within your work environment, or is there explicit discussion of the role of faith and individual and collective morality?
4. Do you engage in pro bono work as an expression of your theology of service?
5. What role does faith play, if any, in your interaction with clients? What if you know the client is a person of strong faith commitments?
6. How, if at all, is your faith at odds with the pressures, expectations, or realities of the profession?
7. How do you integrate your personal faith and morality and the reality of your work environment or the profession in general?

Jury Instruction Template

1. What resources did your or the lawyers use to draft the jury instructions?
2. What is the purpose of the jury instructions?
3. What jury instructions did the parties advocate or argue for?
4. Did any of the parties draft a specific jury instruction to address a unique or specific aspect of the case?
5. How did the parties organize the jury instructions?
6. What role did the judge play? What decisions did the judge have to make?
7. Did the judge both read the instructions and provide a copy to the jury?
8. When did the judge present the jury instructions to the jury?
9. Were the jury instructions easy to understand, or did some of the instructions leave room for ambiguity?
Did the jury have questions about any of the instructions?

Associate Dean Lisa Montpetit Brabbit

Land Use Planning Board or Zoning Commission Meeting

1. Describe the Board or Commission. Who are the members? Who appointed them? How long are their terms? What are their responsibilities? What are the powers of the Board or Commission?
2. Describe the applicants or interested parties at the meeting. Were they citizens, companies, other governmental bodies, etc.? Were they represented by attorneys? What were their goals?
3. Was an attorney present to advise the Board or Commission? What was their role in the meeting?
4. How was public comment structured? Was there a time limit? Who could testify? Who testified or spoke to the Board/Commission about the issues? What other principles were evident in the testimony? Did these principles noticeably impact the decision-making body?
5. If possible, get or review a copy of the governmental unit's comprehensive plan. When was it written? Who was involved in writing it? What can you infer about the local unit of government from its comprehensive plan? Was the applicable comprehensive plan discussed during the meeting?
6. Explain the relationship between the comprehensive plan and the zoning ordinance.

Associate Dean Lisa Montpetit Brabbit

Legislative/Committee Hearing Template

1. What were the roles of the following individuals: chair, committee members, staff, lobbyists, the public, or other interested parties?
2. How was the committee convened?
3. Are minutes generated from the meeting? How is the discussion preserved and why?
4. What was the issued debated? Was the issue fairly represented by all prospective stakeholders?
5. To what extent did the debate appear “political?” Did the substantive elements of the issues receive the appropriate focus and attention?
6. Did the outcome appear to be reflective of the issues raised in the discussion? Do you think the outcome was appropriate?
7. What was the purpose of the questions asked? To gather facts? To set the stage for further discussion?
8. If you observed the chair and the senior members of the committee before and after the hearing, what happened?
9. How do the lobbyists connect with committee members?
10. What role did the media play, if any?

Associate Dean Lisa Montpetit Brabbit

Legislative / Floor Debate Template

1. How did the issue get to the floor? What is the relevant history of the issue before the legislature?
2. What rules govern the floor debate? Are the rules followed? What happens if they are not? What are Mason's Rules?
3. Is there a time limit to an individual's comments or the debate?
4. What was the role of the following individuals: Speaker, Majority Leader, Minority Leader, and Chief Clerk?
5. Was the issue thoroughly explored?
6. What was the outcome of the debate?
7. Did the "process" seem fair?
8. How was the vote taken? What was the outcome? Do you agree with the outcome?
9. What role did the media play, if any?

Associate Dean Lisa Montpetit Brabbit

Mediation Template

1. What is the role of the mediator? Did the mediator explain his/her role to the litigants?
2. How was the mediator selected? Did the parties agree on a mediator or was the mediator appointed? If the mediator was agreed to by the parties, what factors did the mediator consider in selecting the mediator?
3. What is the experience of the mediator? How important is his/her experience in establishing credibility and trust?
4. Did the mediator separate the parties or keep the parties together? What are the advantages and disadvantages to those methods for mediation?
5. Was the mediator licensed or certified? What are the requirements of licensure or certification? Was it important or irrelevant to the process that the mediator held those credentials?
6. Did the mediator require the parties to sign a mediation agreement? What did the mediation agreement outline? Did the mediation agreement address ethical issues? What were they?
7. What did you find interesting or surprising about the way the mediation unfolded?
8. How involved was the client? Who seemed to be making the decisions?
9. State statutes address confidentiality in the mediation process. What rules governed confidentiality during the mediation you observed? Did the mediator review the rules of confidentiality before or during the process? Did the rules adequately allow the parties to talk openly with the mediator while protecting the client's interests?
10. Was the mediation successful? What factors contributed to the success of the mediation?
11. What was the cost of the mediation? Who covered the cost of the mediator?

Associate Dean Lisa Montpetit Brabbit

Medical Records (Tort Case) Template

1. Review Rule 35 of the Minnesota Rules of Civil Procedure for state actions. What is the scope of the rule? How does the rule define disclosure of medical information and under what circumstances? Is there a corresponding federal Rule 35? In what ways are the two rules different?
2. How are medical records admitted into evidence?
3. Do the parties redact any information in the medical records before the jury inspects the records? What type of information, if any, is taken out?
4. What challenges are present in trying to read and understand the records? What resources are helpful in understanding the records? What are some common abbreviations that the medical personnel use to record information?
5. Review the medical records release form. What does the release allow for? Does the release allow the lawyer to speak to the physician? How long is the release good for?
6. Are there any statutes that impact the disclosure of medical information?
7. Did the lawyers and/or the parties have to pay for the records? Who determines the cost of the records?

Associate Dean Lisa Montpetit Brabbit

Negotiation Template

1. What role does negotiation play in the mentor's practice?
2. What are the preferred methods of communication for the negotiation process: phone, in-person, e-mail, or letter? Are there advantages and disadvantages to the various methods of communication?
3. How involved was the client in the negotiation process? How did the mentor prepare the client for a negotiation?
4. From a procedural standpoint, when is negotiation appropriate?
5. How did the mentor and the client decide the following:
 - a. whether the client should participate in the negotiations
 - b. what the client is trying to accomplish through the negotiations as well as what you expect the other side is trying to accomplish through the negotiations
 - c. what should be "on the table" at the negotiations
 - d. whether to make/accept a settlement proposal
6. When the other attorney asks for information you don't want to disclose, how do you respond in a way that protects your client's interest but also allows you to retain your integrity and credibility?
7. What advice does the mentor have for a law student to help him/her better prepare himself/herself for the extent to which negotiations will play a role in his/her practice?
8. After observing the negotiation, what did you find interesting about the way the negotiations unfolded?
9. Does the mentor have a different negotiation style with different individuals? What are the factors that determine how the mentor will proceed?
10. Was the negotiation successful? Why or why not? If yes, how long was the process?
11. Was the negotiation an efficient way of reaching a mutually acceptable agreement? Why or why not?

Networking Template

1. How important is building, maintaining, and expanding relationships through networking in the legal profession?
2. How has the lawyer built and maintained their network of professional relationships?
3. What approaches are most useful in expanding a professional network?
4. What resources or strategies might you use to cater networking to fit your personality type or professional development path?
5. How does relationship building through networking strategy change when involving colleagues, current clients, prospective clients, partners, judges, or others?
6. How is a networking conversation at a networking event different from an individual networking meeting? What suggestions do you have for engaging others in both settings?
7. In what circumstances does the lawyer prepare for networking opportunities and how?
8. If you are attending an event where you do not know many people, what are some strategies that will help you engage others?
9. What are some practical networking expectations and methods particular to the customs, standards, pressures, and other aspects of the legal profession?
10. What role does cultural competency play in networking? What lessons has the lawyer learned about networking with people from different cultures? What tips can the lawyer share for developing cultural competency to better relate to and converse with others while networking?
11. What is the relationship between networking and marketing?
12. What additional advice can the lawyer give to a student wanting to expand their professional relationships through networking?

Director of Mentor Externship Judith Rush
and Jules Porter ('18)

Opening Statement Template

1. Describe the communication style of the attorneys. Did they use notes? Did they use a lectern? Did they appear to believe in the case? How did the jury seem to react?
2. Did opposing counsel raise any objections during the opening statement? On what ground? Did the judge sustain or overrule the objection?
3. How did the opening statement convey the theory of the case? When was it conveyed? Was the theory of the case repeated? Was it presented in a way easily understandable to jurors?
4. Evaluate the first minute of the opening statement. What type of first impression did it leave with you? What was communicated during this first minute?
5. What themes were communicated during the opening statement? Were they effective? Why or why not?
6. Outline the contents of the opening statement. Which of these issues were introduced and/or discussed during the opening statement: parties, scene, instrumentality, issue, what happened, basis of liability/non-liability or guilt/non-guilt, anticipation, and refutation of other side's theory, damages?
7. How long was the opening statement? Did the jurors remain attentive the whole time? In your opinion, was it too long, too short, or just right?
8. How did you feel about the case at the conclusion of the opening statement? If you were a juror, would you be interested and perhaps excited about hearing the evidence? If you were a juror, what questions about the case would you have after listening to the opening statement?
9. Talk with your mentor or another attorney about the importance of opening statements. What do they think are the most important things to consider when writing and delivering an opening statement? What are the do's and don'ts? What type of preparation is necessary to deliver an effective opening statement?

Associate Dean Lisa Montpetit Brabbit

Pretrial Conference (Civil) Template

1. Was the pretrial conference requested by one of the parties' or ordered by the court? What was the purpose of the pretrial? Did the judge require certain individuals to attend?
2. How did the judge's skills and personality impact the conference?
3. Was settlement discussed at the conference? Were any new offers or demands made by the parties? Why hadn't settlement occurred prior to this point? How did the judge address the issue of settlement?
4. Were the attorneys adequately prepared for the conference? How could you tell? What type of preparation is necessary for a pretrial conference? How did the attorney's preparation or lack thereof impact the conference?
5. What lawyering skills were helpful or necessary? How did the attorneys' skills or lack thereof impact the conference?
6. Was discovery in the case complete at the time of the pretrial? If not, did this impact the position of the parties at the pretrial?
7. Discuss the plans for trial. Are they adequate? To what degree will the plans made at this conference expedite the disposition of the issue? Did the judge issue a pretrial order?
8. Review the Minnesota Rule of Civil Procedure 16.03 – which of the listed “subjects for consideration” were addressed at the pretrial conference? Are there subjects listed in the Rule that were not addressed at the pretrial conference that you think deserved attention at the conference?

Associate Dean Lisa Montpetit Brabbit

Pro Bono Work Template

1. How important is pro bono work to the mentor's legal employer? To the community as a whole?
2. How significant is pro bono work to the practice of law? Why? Can the profession do better? How?
3. What are the mentor's motivations for doing pro bono work?
4. How does the mentor's firm/organization encourage its attorneys to take pro bono cases?
5. Is there a conflict between billable work and pro bono work? What takes priority and what are the factors considered? How are such conflicts resolved, both personally and organizationally?
6. What types of pro bono work does the mentor do and how did they get involved in that specific work? What type of pro bono work would be important to you?
7. Does pro bono work contribute to or detract from having balance in the mentor's life?
8. How do the financial limitations of doing legal work for free affect, if at all, the quality of representation provided?
9. Should pro bono work be required of all licensed attorneys?

Professional Responsibility / Ethics Template

1. What circumstances have provoked your most difficult ethical dilemmas in your work?
2. What are the most common ethical problems associated with your practice?
3. How often do you observe ethical issues? Have you ever reported an ethics violation to the board of professional responsibility?
4. How often does the intersection of income and ethical practice cause moral tension? In what circumstances? How do you approach resolving that tension?
5. How are the Rules of Professional Conduct viewed in general practice? As a minimum requirement? As a definitive set of guidelines outside of which one can operate and act freely (i.e. as long as I'm not explicitly violating the rule, I'm free to act as I please)?
6. Are the Rules effective in regulating the profession?
7. On January 11, 2001, the Minnesota Supreme Court adopted the Professionalism Aspirations. What purpose do they serve? How are the Professionalism Aspirations viewed in general practice? How often do you observe lawyer behavior that falls short of the Aspirations? What are the common shortcomings?
8. What does your personal sense of ethical behavior/practice require of you that would be acceptable or unacceptable under the Rules of Professional Conduct?

Sales - Transaction Conducted Electronically Template

1. Identify the offer and the acceptance of the offer.
2. How is the contract memorialized? Is there a printed record of the final contract?
3. What law applies to the resolution of this dispute? Is it a particular state's contract law; if so, has this state enacted the Uniform Electronic Transactions Act? Is it the federal Electronic Signatures in Global and National Commerce Act? How was that jurisdiction chosen?
4. Does the contract contain an arbitration clause?

Professor Elizabeth Schiltz

Sales – Warranty Disclaimer Template

1. Is this a consumer transaction or a commercial transaction? Does that make a difference to this issue?
2. Are there any statutory limitations on the breadth or effectiveness of such a disclaimer?
3. What type of warranty is being claimed: implied or express, merchantability or fitness for a particular purpose?
4. How conspicuous is the disclaimer?
5. Is this disclaimer effective? If not, how could it be amended to have the effect that the drafters probably intended?

Professor Elizabeth Schiltz

Scheduling/Discovery Conference Template

1. Fed. R. Civ. P. 26(f) provides that litigants must plan for discovery. What does Rule 26(f) require? Is there a corresponding rule in state court? Does Minn. R. Civ. P. 16.02-.03 apply? What does Rule 16.02-.03 require? How are the two rules different?
2. What is the purpose of the conference? Is a scheduling conference required in every case filed with the court?
3. What are the litigants requesting? Did the judge impose any limitations on the time frame for discovery? For motions?
4. What is the role of the judge? Why would the court request a scheduling conference? Is the court concerned about case management?
5. Did the court issue an order requiring a scheduling conference, or did one of the litigants request the court hold the conference?
6. Who was required to appear at the conference? Was the client present? If the client was present, what role did the client play? If the client was not present, why not?
7. What documentation did the court require of the parties prior to the conference? What is an Informational Statement Form and how is it relevant to the discovery conference?
8. How formal / informal was the process? Did the conference take place by telephone, in chambers, or in the courtroom?
9. What was the result of the conference? Did the court issue an order following the conference? What did it outline?
10. If the court issues an order outlining the dates and deadlines for discovery, can the litigants request an extension on a later date? How is that accomplished?

Settlement Conference Template

1. Was the settlement conference court ordered or initiated by the parties? Are settlement conferences common to this type of dispute? Who attended? Did the judge require certain individuals to be present?
2. Who conducted or refereed the settlement conference?
3. What was the position of the parties at the beginning of the conference? How did their positions change (if at all) during the course of the conference?
4. Comment on the strategies used by each party during the settlement conference. Which strategies were most effective? Why?
5. How did the attorneys prepare for the settlement conference? Were they adequately prepared? Ask your mentor or another attorney about what he or she thinks are the most important things to remember when trying to negotiate a settlement.
6. Did settlement occur? Why or why not? What were the biggest barriers and challenges to settlement?
7. How do the applicable court rules address settlement and settlement offers? What do the Model Rules of Professional Conduct say about settlement? Ask your mentor or another attorney if and how the attitude about and process of pretrial settlement has changed over the past decade.
8. Comment on the worth and practicality of the settlement conference that you observed. What was the most important lesson you learned about settlement?

Associate Dean Lisa Montpetit Brabbit

Site Inspection (Torts Case) Template

1. Who attended the site inspection? Why did they attend? Did the parties have any experts present?
2. What steps were taken to arrange for the inspection? Was the court involved? Did the parties need to obtain permission from an individual or entity?
3. What were the parties or lawyers looking for? What did they find?
4. How did the parties record the information (i.e., video, photos, written notes, audio)? Are these recordings discoverable in litigation?
5. How was the evidence preserved, if at all? Did any party raise the issue of spoliation of evidence? What happens if one party removes, destroys, or otherwise alters key evidence in the case?

Associate Dean Lisa Montpetit Brabbit

Title Search or Closing Template

1. Were all the parties present with counsel? If not, do you believe that party was at a disadvantage? If one or more of the parties were represented, what was the attorney's role before, during and after the search or closing process?
2. Do the parties seem to be fully appraised of their legal rights and responsibilities during the process? Why or why not? What could be done to better inform the parties of their legal rights and responsibilities?
3. Why is a title search necessary when refinancing or purchasing property?
4. Who conducted the title search? How was it conducted? What was the fee for the title search?
5. In a closing, what other actions besides a title search are legally necessary?
6. What is the difference between an owner's title insurance policy and an attorney's title opinion? What are the advantages or disadvantages of each? Is one or the other required?
7. What is the difference between abstract property and torrens property?
8. In a closing, did the purchase agreement have an arbitration agreement addendum? Did the parties sign it? What (if any) discussion about the addendum took place?
9. What issues came up during the search or closing? How were they resolved?

Torts Template

1. Discuss the four elements of a negligence claim: duty, breach, causation, and damages. What element of the plaintiff's case presents the most difficulty and why?
2. What does the mentor consider when drafting pleadings in a tort claim? What statutes and rules impact the way the pleadings are drafted in a tort claim?
3. What are some of the statutes of limitations in a tort claim? Do statutes of limitations vary from state to state?
4. What defenses can be raised? When are defenses first raised and how? Does a lawyer tailor the discovery around the defenses? How?
5. What is the burden of proof? Who has the burden of proof? Does the burden of proof ever shift to the opposing party?
6. How does the plaintiff outline the damages in the tort claim? Are there compensatory damages? What other types of damages are there?
7. How does a plaintiff prove punitive damages in a tort claim? What does a plaintiff's lawyer need to demonstrate in order to get the issue of punitive damages to the jury? What does the statute require before a motion for punitive damages will be granted?
8. In a personal injury matter, how does the plaintiff's lawyer prove causation?
9. Is summary judgment an appropriate tool for the defense? What about for the plaintiff? What is the basis for the motion? When should a summary judgment motion be brought?
10. Were depositions taken in the claim? Do the questions focus on the elements or defenses of the claim? What types of questions were asked? For what purpose?
11. How important is the credibility of the plaintiff in a torts case? Does the lawyer investigate the credibility of the plaintiff? How?
12. What experts will testify at trial? Why? What will they offer? Will the expert testify live or by videotape?

Associate Dean Lisa Montpetit Brabbit

Voir Dire Template

1. Discuss the type of trial and jurisdiction. What rules regarding voir dire are applicable? What “rules” were set by the judge regarding the questions the lawyers could ask?
2. Discuss the purposes of voir dire with your mentor or another attorney. How does the purpose of voir dire (or the balance of purposes) differ with different types of cases?
3. Were written questionnaires used for prospective jurors? Did your mentor/attorney submit questions for the questionnaire? How did your mentor/attorney utilize the answers to the questionnaires prior to voir dire? What types of cases lend themselves to a questionnaire?
4. How did your mentor/attorney prepare for voir dire? How much time did it take? How does the preparation vary for different types of trials?
5. What questions did the judge ask the jurors? How many jurors were excused after the judge’s questioning?
6. What are challenges for cause? What types of challenges for cause were used in this instance, if any?
7. What are peremptory challenges? How many could be used on this case? Were they all used? Were there objections to any of the peremptory challenges? How were these objections handled?
8. In addition to the prospective juror’s verbal answers to questioning, what else was your mentor or attorney looking for? Why? What nonverbal actions might be meaningful? Why?
9. Did you feel that the attorneys were “arguing” the case in voir dire? How so?
10. How did the attorney decide who to strike? How did this process occur?

Associate Dean Lisa Montpetit Brabbit

Wills, Estates and Trusts Template

1. What effort was made to determine the competency and freedom of the testator?
2. What efforts were made to provide for family?
3. To what extent were standardized forms employed? What values do they serve?
4. In a probate matter, who is the client? Can a lawyer have more than one client?
5. What are the notice requirements for probate? What happens if the notice requirements are missed? What statute(s) governs notice? What does the statute say about whom you have to give notice to?
6. What are the notice requirements for intestacy? What efforts were made to contact the heirs?

Associate Dean Lisa Montpetit Brabbit
and Professor Charles Reid